B8545-1-U

1987

U.S. HISPANIC MARKET STUDY

Strategy Research Corporation

This study shall not be reproduced, in total or in part, by any means mechanical or otherwise, nor shall any use be made of this study without the express authorization of STRATEGY RESEARCH CORPORATION. Any unauthorized reproduction or use shall be prosecuted to the full extent of the law.

1987

U.S. HISPANIC MARKET STUDY

© 1986 by Strategy Research Corporation. All rights reserved.

ACKNOWLEDGMENTS

We wish to commend the sponsoring companies for their vision in recognizing the importance of the current U.S. Hispanic market.

By sponsoring the **1987 U.S. Hispanic Market Study**, these companies have demonstrated their commitment to and their support of this emerging market and its potential.

Strategy Research Corporation wishes to thank the Sponsors for making this Study possible and to acknowledge their contribution to this Project.

We proudly list the Gold, Silver and Bronze Sponsors on the following pages.

SALUDOS Y GRACIAS

Richard W. Tobin, President
Strategy Research Corporation

Gail Hall, Vice President-Editor
Strategy Research Corporation

GOLD SPONSORS

BLAIRSPAN

- TELEVISION SALES REPRESENTATIVES
- PROGRAM DISTRIBUTORS

BLAIR SPANISH TELEVISION OF FLORIDA
WSCV-TV CHANNEL 51
MIAMI / FT. LAUDERDALE

TELEMUNDO
WKAQ-TV CHANNEL 2
SAN JUAN

JOHN BLAIR & COMPANY
1290 AVENUE OF THE AMERICAS • NEW YORK, NY 10104

Coors®

Fine Quality Beers Since 1873.

THE BRAVO GROUP

THE HISPANIC MARKETS DIVISION OF YOUNG & RUBICAM INC.

SPONSOR

CABALLERO
RADIO NETWORK

SPONSOR

CRC

Cadena Radio Centro

**THE SPANISH RADIO NETWORK
CONNECTED VIA SATELLITE
24 HOURS A DAY**

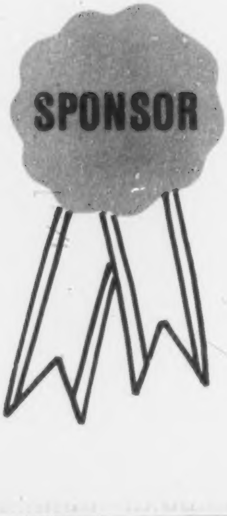
SPONSOR

EASTERN

and

Campbell-Ewald Latina
ADVERTISING

Tome
Coca-Cola
MARCA REG.



Conill
Advertising
INC.

JCPenney

NATIONAL ASSOCIATION OF HISPANIC PUBLICATIONS

Entrada
The Key to Spanish Print Media

AHORA	RENO
DIARIO LAS AMERICAS	MIAMI
DIRECTORIO HISPANO	READING
DOS MUNDOS	KANSAS CITY
EL EDITOR	ODDESA
EL EDITOR	LUBBOCK
EL HERALDO	CHICAGO
EL HISPANO	ALBUQUERQUE
EL LATINO	WASHINGTON
EL MEXICALO	BAKERSFIELD
EL MUNDO	LAS VEGAS
EL MUNDO	S. FRANCISCO
EL POPULAR	BAKERSFIELD
EL SOL DE TEXAS	DALLAS
EL VIDA	OXNARD
IMPACTO	NEW YORK
LA AURORA	DALLAS
LA GUIA	VAN NUYS
LA NACION	MIAMI
LA OFERTA	SAN JOSE
LA OPINION	LOS ANGELES
LA PRENSA	ORLANDO
LA VOZ	POMONA
LA VOZ DE COLORADO	DENVER
LA VOZ HISPANA	NEW YORK
MOMENTO	CHICAGO
MUNDO HISPANICO	ATLANTA
NEIGHBORHOOD NEWS	SANTA ANA
NOTICIAS DEL MUNDO	NEW YORK
NOTICIAS DEL MUNDO	CHICAGO
NOTICIAS DEL MUNDO	S. FRANCISCO
NOTICIAS DEL MUNDO	LOS ANGELES
QUE PASA	HARTFORD
RENACIMIENTO	LANSING
TELEGUIA	CHICAGO
THE AUSTIN LIGHT	AUSTIN
THE FORUM	SAN DIEGO
THE HERALD GROUP	CHICAGO
WEST SIDE PAPERS	CHICAGO

WNJU-TV NEW YORK 47

NetSpan

55
W55AS
Milwaukee

VEA 52
EL CANAL DE LOS ANGELES

SPONSOR

26 wciu·tv
chicago

The **Prudential**

Insurance & Other
Financial Services

SPONSOR

Radio Suave
12-60 AM

MIAMI

SIN
TELEVISION NETWORK

Spanish International
Communications Corporation

SPONSOR

VISTA

THE HISPANIC MAGAZINE

SUPER Q
FM 108

W-QBA

SPONSOR

1140 AM

MIAMI

Zubi Advertising Services, Inc.

SILVER SPONSORS

AT&T

The right choice.

SPONSOR

LA FLOR

AMERICAN GREETINGS

SPONSOR

Beatrice / Hunt-Wesson

SPONSOR

C&P

Casanova, Pendrill Publicidad, Inc.

SPONSOR

CASTOR

CASTOR SPANISH INTERNATIONAL, INC.
HISPANIC ADVERTISING

New York • Los Angeles •
San Francisco • Miami

CONSOLIDATED BANK

Florida

CREATIVE GROUP

Diario Las Américas

The Spanish-language Daily Newspaper
Founded July 4, 1953

SPONSOR

Donnelley Marketing

a company of
The Dun & Bradstreet Corporation

el diario/la prensa

SPONSOR

GENERAL
FOODS

SPONSOR

iac

IAC Advertising
Group Inc.

SPONSOR

MBM

Merced Benitez Machin & Asoc. Inc.

SPONSOR

MIAMI

mensual monthly

Montemayor y Asociados, Inc.

A Hispanic advertising agency

SPONSOR

TSR
TICHENOR SPANISH RADIO

A DIVISION OF TICHENOR MEDIA SYSTEM, INC.

KGBT
McAllen/Brownsville

KUNO
Corpus Christi

KCOR
San Antonio

KLAT
Houston

KDXX/KBNA
El Paso

WIND
Chicago

SPONSOR

44

WSNS TV CHICAGO

SPONSOR

BRONZE SPONSORS

SPONSOR

100

There's more for your life at SEARS

Celebrating Our New Century

SPONSOR

AMERICAN EXPRESS ® TRAVEL RELATED SERVICES

An American Express company

CITICORP CITIBANK®

SPONSOR

IBERIA

AIRLINES OF SPAIN

SPONSOR

Mazola OIL **Mazola** OIL **Mazola** OIL

LOTUS
HISPANIC
REPS

Metropolitan Life
AND AFFILIATED COMPANIES

SPONSOR

BRISTOL-MYERS COMPANY

BRISTOL-MYERS PRODUCTS

CLAIROL, INC.

SPONSOR

THE SEVEN-UP COMPANY 7UP

SPONSOR

Selecciones
del Reader's Digest

SPONSOR

Southwestern Bell
Telephone

THE
SOUTHLAND
CORPORATION

TABLE OF CONTENTS

PAGE

I. **PURPOSE, SCOPE AND METHODOLOGY** 1

- A. PURPOSE AND SCOPE 1
- B. METHODOLOGY 2

II. **IMMIGRATION TO UNITED STATES** 7

- A. LATIN IMMIGRATION TO UNITED STATES 7
- B. HISTORICAL BACKGROUND 11
- C. CURRENT IMMIGRATION PATTERNS AND UNDERLYING REASONS FOR THE IMMIGRATION 19

III. **POPULATION AND DEMOGRAPHIC PROFILE** 37

- A. WORLD RANK 38
- B. COUNTRY OF ORIGIN 39
- C. POPULATION BY REGION AND STATE 43
- D. HISPANIC POPULATION GROWTH 50
- E. HISPANIC VERSUS TOTAL U.S. POPULATION BY REGION 52
- F. AGE/SEX DISTRIBUTION 160
- G. HOUSEHOLD SIZE 161
- H. MEDIAN INCOME 162
- I. EDUCATION 164
- J. EMPLOYMENT 165

IV. **LANGUAGE PATTERNS** 171

- A. FIRST LANGUAGE LEARNED TO SPEAK 175
- B. ABILITY TO SPEAK SPANISH 177
- C. ABILITY TO SPEAK ENGLISH 179
- D. ABILITY TO WRITE SPANISH 181
- E. ABILITY TO WRITE ENGLISH 183
- F. ABILITY TO READ SPANISH 185
- G. ABILITY TO READ ENGLISH 187
- H. LANGUAGE SPOKEN AT HOME 189
- I. LANGUAGE SPOKEN AT WORK 191
- J. LANGUAGE SPOKEN ON SOCIAL OCCASIONS 193
- K. LANGUAGE MOST COMFORTABLE SPEAKING 195
- L. ATTITUDES REGARDING LANGUAGE 197

Continued. . .

TABLE OF CONTENTS
(Continued)

PAGE

V. HOUSEHOLD INCOME & PERSONAL CONSUMPTION EXPENDITURES 203

- A. MEDIAN FAMILY INCOME 203
- B. MEAN HOUSEHOLD INCOME/ AGGREGATE HOUSEHOLD INCOME 206
- C. PERSONAL CONSUMPTION EXPENDITURES 208

VI. MARKET BY MARKET 211

- A. TOP 33 ADI'S 213
- B. UNITED STATES/MEXICO BORDER MARKETS 367
- C. ADDITIONAL HISPANIC COUNTIES 371

VII. PUERTO RICO 377

VIII. RESIDENCY IN THE UNITED STATES 383

- A. LENGTH OF RESIDENCY 383
- B. PLACE OF PRIOR RESIDENCE 386
- C. REASONS FOR LEAVING COUNTRY OF PRIOR RESIDENCE 390
- D. LIKES/DISLIKES ABOUT LEAVING IN THE U.S. 394
- E. DESIRED CHANGES/IMPROVEMENTS 405
- F. ECONOMIC STATUS 412

IX. CULTURAL/LIFESTYLE MEASURES 419

- A. SELF IDENTIFICATION 419
- B. SOCIAL ATTITUDES 423
- C. ATTITUDINAL INDICATORS 430

X. FAST-FOOD RESTAURANT PATRONAGE 437

- A. HAMBURGER FAST-FOOD RESTAURANTS 439
- B. CHICKEN FAST-FOOD RESTAURANTS 442
- C. PIZZA FAST-FOOD RESTAURANTS 445

Continued. . .

TABLE OF CONTENTS
(Continued)

PAGE

XI. FOOD STORE PATRONAGE 451

- A. TYPE OF STORE PATRONIZED MOST OFTEN 451
- B. BRAND LOYALTY 454
- C. WEEKLY GROCERY EXPENDITURES 456
- D. COUPON USAGE 457

XII. DEPARTMENT STORE PATRONAGE 467

XIII. SHOPPING PREFERENCES 473

XIV. BRAND PERCEPTIONS 479

XV. PRODUCT USAGE 495

- A. HISPANIC AND NON-HISPANIC HOUSEHOLD USAGE 496
- B. HISPANIC HOUSEHOLD USAGE 505

XVI. OWNERSHIP PATTERNS 529

XVII. AIRLINE TRAVEL PATTERNS 547

XVIII. CONCLUSIONS 557

I. PURPOSE, SCOPE AND METHODOLOGY

A. PURPOSE AND SCOPE OF THE STUDY

For many years, the United States Hispanic population has experienced significant growth and development, making it one of the most dynamic communities in the nation in terms of population, economic growth and change.

These developments and accomplishments have been realized through the efforts of the U.S. Hispanic residents. These residents, many of whom are relatively recent arrivals, have made the United States their home and hence have built the U.S. Hispanic community.

The dynamics of the U.S. Hispanic community require constant study to measure the size and components of its population. The demographic and socio-economic profile of the residents must also be measured.

Therefore, the Purpose of this Study is to provide marketing and media decision-makers with comprehensive and useful information on the 1987 U.S. Hispanic market. Much of this Report deals with demographic characteristics such as population comparisons and estimates, geographic concentrations, age/sex distributions and income levels. However, the Report goes beyond basic statistics by taking a historical look at Hispanic participation and assimilation in this country.

In addition, this 1987 U.S. Hispanic Market Study provides current information with regard to the shopping patterns, restaurant patronage as well as ownership and travel patterns of the Hispanic-American market. It provides comprehensive data with regard to product usage by households in the United States (Hispanic and non-Hispanic comparisons).

This Study also provides coverage in terms of the psychographic and social inclinations of the U.S. Hispanic market, including such areas as language usage, preference and assimilation, as well as other measures of cultural identity.

The Scope of this Study is the United States and the Commonwealth of Puerto Rico.

This Study seeks to present not only population estimates and socio-economic data on this market, but also to show how and why the market has grown.

B. METHODOLOGY

Strategy Research Corporation conducted both primary and secondary research in the gathering and analysis of information provided in this report.

Secondary data sources are cited in the Report. Several U.S. Census publications were utilized including almanacs and atlases, books dealing with Hispanics, periodicals, State and Federal sources, Strategy Research Corporation sources, as well as several other miscellaneous publications.

Population totals were drawn from U.S. Department of Commerce, Bureau of the Census published reports. Population forecasts utilized in the Study were made by Strategy Research Corporation, experts in the field of demography and forecasting.

With regard to population and socio-economic projections and forecasts, the primary method of data collection used for this Study consisted of personal interview surveys conducted by Strategy Research Corporation. These surveys have been analyzed to provide the basis for population and socio-economic characteristics estimates and forecasts, along with a significant amount of other data published by various reliable sources, including the Bureau of the Census, the Department of Immigration, and Market Statistics, Inc.

With regard to current Lifestyle, Language and Product Usage, the primary research conducted by Strategy Research Corporation consisted of the Survey Research Method.

The sample for the Lifestyle and Language data consisted of a total of 2,003 interviews conducted throughout 21 U.S. Hispanic markets. The Denver market was included in the sample, however, Denver was the only market which falls in the Northwest region of the United States and therefore was not utilized for cross-tabulation purposes.

The sample utilized for the Product Usage data included 2,000 interviews conducted in the same 21 U.S. Hispanic markets. In addition, 600 personal, at-home interviews were completed with non-Hispanic respondents using a national probability sample.

The sample was drawn in Strategy Research Corporation's Miami office by the professional sampling staff. A Clustering Technique was used, procedural in samples for in-home interviews. The sampling cluster points were actual Census blocks taken from the 1980 Federal Census updated to 1987 by Strategy Research Corporation. SRC maintains currently updated Census block, Census tract and household data for survey and economic research purposes. A random probability sample was pulled, using a random starting point and a sequential interval of persons.

Once a random skip pattern was established, sampling points were assigned to their appropriate Census blocks. These statistics were transferred to Census block maps and then to street maps. For each block, one of six random house selection patterns was chosen randomly, and individual block maps were labeled with street names, starting points, skip patterns, and rotation directions. Nine interviews were completed within each cluster, which consists of one sample block.

All Lifestyle, Language and Product Usage surveys consisted of personal, in-home face-to-face interviews among U.S. Hispanics. These interviews were conducted by trained, professional interviewers of Strategy Research Corporation working under the direct supervision of Strategy Research Corporation Field Staff supervisors. In addition, all interviewing was conducted by Hispanic, bilingual interviewers from the market area in which they were interviewing. All non-Hispanic interviews were conducted by Strategy Research Corporation's non-Hispanic interviewers.

Following the completion of field interviewing, a minimum of 20 percent of each interviewer's work was validated daily. All questionnaires were then edited, coded and prepared for computer tabulation.

All programming and data processing was done in-house by full-time Strategy Research Corporation personnel. Strategy Research Corporation operates one of the largest in-house marketing research computer facilities in the United States.

During processing, the interviews were computer-weighted to project the results to the population of each individual market, as well as the U.S. Hispanic market overall.

Limitations:

Strategy Research Corporation employs the best of industry practices and standards in its work, and utilizes the best efforts to produce reliable studies. Nevertheless, no claim is made that the Survey is free of all errors, and the firm accepts no liability for the information or interpretation contained within this Report.

No reports of Strategy Research Corporation are to be reproduced in whole or part, or distributed without prior written permission from Strategy Research Corporation.

II. IMMIGRATION TO THE UNITED STATES

II. IMMIGRATION TO THE UNITED STATES

A. LATIN IMMIGRATION TO THE UNITED STATES

Ethnic markets in the United States are constantly changing, due primarily to immigration. Statistics for legal immigration are easily obtained as a matter of public record. But there is a larger population of immigrants — a market made up of people who came to the U.S. on tourist visas and never returned to their country of origin; people who came by boat, or crossed a border under cover of darkness. All of these people disappear into urban anonymity.

This is particularly true of Spanish-speaking immigration from Latin America and the Caribbean, from Mexico and Central America.

The proximity of the U.S., a developed and affluent country, to countries with overpopulation, poverty, political repression and instability, and widespread unemployment, leads to a continuation of the past immigration patterns, unless they are checked by Federal Enforcement and new immigration laws, which are now being proposed and legislated. Will they be enforceable, even if passed? Aliens have nothing to lose and everything to gain in attempting a one-way crossing of border and shore.

Listen to the voices of some of these aliens, both legal and illegal immigrants, who are presently residing in the United States in Hispanic markets:

> "Pesos, no. Dollars, sí."
> **Mexico, man, 44 years old**
>
> "I couldn't survive in my country. I came to work."
> **Ecuador, man, 51 years old**
>
> "I am looking for new horizons in every respect."
> **Spain, woman, 31 years old**
>
> "My son came looking for work. We both want a good life."
> **Dominican Republic, woman, 48 years old**
>
> "My husband became ill and he could get medical care in this country."
> **Cuba, woman, 54 years old**
>
> "My child needed medical attention. I had to bring him to a special clinic in California."
> **Puerto Rico, woman, 24 years old**
>
> "I got out of there because what you had there was a living hell."
> **Cuba, man, 27 years old**

"I wanted my kids to get a new life, a better future."
Honduras, married couple, late 40's

"I wanted to join my family."
Costa Rica, man, 23 years old

"My kids did not have anything to eat and I need work."
Mexico, woman, 46 years old

"I came looking for work. There are no jobs there."
Peru, man, 46 years old

"The political persecution is unbearable."
El Salvador, woman, 31 years old

"The politics of my country is not to our liking. It's communist."
Nicaragua, woman, 58 years old

"Politics, they would not let me live."
Guatemala, man, 36 years old

"I am a musician. I had to leave because I could not express myself."
Cuba, man, 58 years old

"For political reasons, I struggled, I suffered to be free."
Cuba, woman, 45 years old

"I kept thinking about all the opportunities that my children could have."
Colombia, woman, 55 years old

"Looking for an adventure."
Spain, man, 58 years old

"Everyone talked about this country, that it was good, that there were lots of commodities. My husband came first and then sent for me."
Puerto Rico, woman, 36 years old

"My family brought me. All my family lives here in the U.S."
Puerto Rico, man, 19 years old

"I came to study and to try and put some money together in order to free my parents."
Mexico, man, 32 years old

> "To get an education was always my desire."
> **Mexico, man, 38 years old**

> "We came to be with my husband, so together we could give our children a better life."
> **Mexico, woman, 55 years old**

The story of immigration is not just numbers. Behind each odyssey is a momentous decision, sometimes of epic proportion. From the moment these immigrants begin life anew, each day brings a sense of doubt or a sense of conviction, a sense of nostalgia and a sense of purpose. In a surprisingly short period of time, an assimilation process unfolds. For some, rapidly. For some, painstakingly slow. But always, the immigrant and ethnic groups represent a marketing challenge and an unusual opportunity to win lifelong loyalties.

In the 35 years from 1951 to 1984, Latins were the largest group of immigrants, accounting for over 30 percent of the total official legal immigration. Puerto Ricans, who are U.S. citizens, are not reported in immigration statistics, nor are any who came to this country without documentation.

The recent immigration from Spanish-speaking countries, added to the significant base already here, makes Hispanics the largest ethnic minority.

The following table shows immigration in ten-year increments:

U.S. TOTAL IMMIGRATION BY MAJOR COUNTRIES & AREAS
1951 - 1984

	1951 - 1960		1961 - 1970		1971 - 1980		1981 - 1984		Total 1951 - 1984	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Europe:										
Germany	477,765	19.0%	190,798	5.7%	74,414	1.7%	29,838	1.3%	772,813	6.1%
Italy	185,491	7.4	214,111	6.4	129,368	2.9	17,859	0.8	546,829	4.4
United Kingdom	204,468	8.1	214,518	6.5	137,374	3.1	60,882	2.7	617,242	4.9
Ireland	48,362	1.9	32,966	1.0	11,490	0.3	4,048	0.2	96,866	0.8
Austria/Hungary	103,743	4.1	26,022	0.8	16,028	0.3	5,840	0.3	151,633	1.2
U.S.S.R.	584	0.0	2,336	0.0	38,961	0.9	33,248	1.4	75,129	0.6
Scandinavia	55,616	2.2	41,801	1.3	14,911	0.3	7,108	0.3	119,436	0.9
Spain	7,894	0.3	44,659	1.4	39,141	0.8	6,972	0.3	98,666	0.8
Other Europe	241,717	9.7	356,154	10,7	338,681	7.5	98,820	4.3	1,035,372	8.2
TOTAL EUROPE	1,325,640	52.7	1,123,363	33.8	800,368	17.8	264,615	11.5	3,513,988	27.9
Canada	377,952	15.0	413,310	12.4	169,939	3.8	47,026	2.1	1,010,227	8.0
Caribbean (Non Spanish)	34,391	1.4	167,613	5:0	324,533	7.2	167,674	7.3	694,211	5.5
Latin America										
Cuba	78,900	3.1	208,500	6.3	268,593	6.0	33,744	1.5	589,737	4.7
Dominican Republic	9,800	0.4	94,100	2.8	148,000	3.3	80,936	3.5	332,836	2.6
Mexico	299,811	11.9	453,937	13.7	640,294	14.2	274,273	12.0	1,668,315	13.2
Central America	44,751	1.8	101,330	3.0	134,640	3.0	100,362	4.4	381,083	3.0
South America	91,628	3.6	257,954	7.8	295,741	6.6	146,084	6.4	791,407	6.3
Other America	59,711	2.4	19,630	0.6	789	0.0	431	0.0	80,561	0.6
TOTAL LATIN AMERICA	584,601	23.2	1,135,451	34.2	1,488,057	33.1	635,830	27.8	3,843,939	30.4
Asia:										
China	9,657	0.4	34,764	1.0	124,326	2.8	134,371	5.9	303,118	2.4
India	1,973	0.0	27,189	0.8	164,134	3.7	92,328	4.0	285,624	2.3
Japan	46,250	1.8	39,988	1.2	49,775	1.1	16,408	0.7	152,421	1.2
Turkey	3,519	0.1	10,142	0.3	13,399	0.3	9,545	0.4	36,605	0.3
Other Asia	88,707	3.5	315,688	9.6	1,236,544	27.5	850,458	37.1	2,491,397	19.7
TOTAL ASIA	150,106	6.0	427,771	12.9	1,588,178	35.3	1,103,110	48.1	3,269,165	25.9
All Australia	16,204	0.6	21,331	0.6	25,594	0.6	8,163	0.4	71,292	0.6
All Africa	14,092	0.6	28,954	0.9	80,799	1.8	58,021	2.5	181,866	1.4
All Other Countries	12,493	0.5	3,884	0.1	15,866	0.4	7,968	0.3	40,211	0.3
TOTAL ALL COUNTRIES	2,515,479	100.0%	3,321,677	100.0%	4,493,334	100.0%	2,294,407	100.0%	12,624,897	100.0%

Notes: Because of changes in boundaries and changes in lists of countries, data for certain countries are not comparable throughout.

Source: U.S. Immigration & Naturalization Service
Strategy Research Corporation

B. HISTORICAL BACKGROUND

A brief history of the development of the United States explains past and present immigration to the U.S. The reasons for current Hispanic immigration have already been touched on with actual quotations. This trend, already established, portends a future Latin immigration that could even accelerate above the current rate.

1. 1500-1850

Early Exploration

From the discovery of America to 1850, the influx of people was for "settlement" rather than as immigration. Several European nations sent explorers, claiming territories for the Spanish, English, and French, and establishing colonies. After the Declaration of Independence, territories were acquired by the Louisiana Purchase, the Independence of Texas and a "Manifest Destiny" set on extending the new frontier from the Atlantic to the Pacific. A good deal of the population growth from 1790-1850 was attributed to a high natural birth rate by pioneer families and an unregulated flow of adventurers, pioneers and fortune-seekers, primarily from Europe.

Nearly two-thirds of the explorers in the first hundred years after Columbus were from Spain. These Spanish explorers were seeking gold for the Spanish treasury and also to claim and colonize territories under the Spanish flag. Missionaries came with the explorers for the purpose of converting the Indians to Christianity. These explorers roamed only as far north as Virginia, but as far west as California.

American Colonies

In the 1760's, as Spain was establishing missions in California, the 13 British colonies had a population of one and a half million people.

Three out of four colonists were descendants of English and Irish settlers. The balance were Scottish, Dutch, German and Swedish. Already they were being described as a new breed, "Americans." The concept of a "melting pot" was gaining credence.

In 1776, the colonies joined forces as a "united" army to fight the British. A peace treaty ended the war in 1783. The new country of the United States was formed and all land east of the Mississippi was free to the first settler to stake a claim.

The Louisiana Purchase was negotiated with France in 1803. For the sum of 25 million dollars, the U.S. acquired territory extending from Louisiana to Canada. Florida was purchased from Spain in 1819 for only five million dollars.

An Independent Texas

When Mexico gained independence from Spain in 1821, its boundaries included what is now California, Texas, Arixona, New Mexico, Nevada, Utah and part of Colorado.

At that time the Mexican government permitted 300 American families to settle in the Texas area. Many more American settlers followed, and in ten years they outnumbered the Mexicans four to one.

Texas was proclaimed independent in 1836 by the American settlers but Mexico disputed this claim. In spite of this, Texas was voted in as a state by the U.S. in 1845.

In 1846, President Taylor ordered troops to the disputed border area and quickly overwhelmed and defeated Mexico. The Treaty of Guadalupe Hidalgo, in 1848, awarded the U.S. all Mexican territory north of the Rio Grande.

With a stroke of a pen, the United States gained a vast Spanish heritage — a population instilled in the culture and traditions of Spain. And because these Spanish people were already settled when the territories were acquired, their numbers do not appear in immigration records. This does, however, explain the basis for the large Hispanic market in the far west, an Hispanic influence which is highly visible and continues to increase.

In 1853, the Gadsden Purchase further aligned the border between the U.S. and Mexico and gave the U.S. an additional 75,000 Mexicans as citizens.

The "Manifest Destiny" linking the U.S. from the Atlantic to the Pacific was realized.

Population Growth 1790-1850

The first census of the new country was conducted in 1790. The population stood at 3,930,000. Only about 100,000 of these people lived west of the Alleghenies. However, people soon began to stream westward. For those people who had already taken the step of crossing the ocean to America, pulling up stakes to move westward to improve their lot was not difficult.

During this time immigration to the United States was minimal. In the fifty years between 1790 and 1840, fewer than one million new residents arrived.

Immigration statistics were not kept until the year 1820, but since that time we can see the progression of immigrants to the U.S.

The following table shows a comparison of population growth to the number of immigrants throughout the history of the U.S.

U. S. POPULATION & IMMIGRATION
1790 -1980

As Of:	Total Population	Population Increase	Number Of Immigrants	Immigrants As Percent Of Total Increase
1790	3,930,000	—	—	—
1820	9,640,000	5,710,000	—*	—
1840	17,069,450	7,429,450	744,595	10.0%
1850	23,190,000	6,120,550	1,719,606	28.1
1790-1850	23,190,000	19,260,000	2,464,201	12.8
1900	75,955,000	52,805,000	16,659,405	31.5
1920	105,710,600	29,715,600	14,531,197	48.9
1950	150,697,000	44,986,400	5,670,678	12.6
1970	203,235,300	52,538,300	5,837,156	11.1
1980	226,545,805	23,310,505	4,493,314	19.3

* Records not kept until 1820.

Data available through 1984

Source: U.S. Bureau of the Census
U.S. Immigration & Naturalization Service
Strategy Research Corporation

From fewer than a million immigrants recorded in the 50 year period, 1790-1840, there was an influx of 1.7 million in the next ten years. This represented 28.1% of the total population increase for that ten-year period.

2. 1850 - 1900

Migration & Immigration

The second half of the 19th Century was a time of major westward expansion. More and more settlers moved into the western lands and Mexican-Americans became an ever decreasing minority.

At the same time, immigrants were beginning to pour into the U.S. from Ireland to escape the potato famine. In the eight years between 1846 and 1854, 1.2 million Irish arrived in the U.S. In the years 1852-1854, a half million Germans also arrived.

Not until the end of the century was there again such a concentrated influx of immigrants; and by then, with the industrial revolution beginning and railroads being built, there was an enormous need for labor in this country.

During this 50-year period (1850 - 1900), the population of the country tripled, from 23 million in 1850 to nearly 76 million in 1900. Immigrants accounted for 32 percent of the total population increase, 16.7 million new arrivals with less than one percent coming from Latin America.

This table shows the percent distribution by country of origin in the eighty years of the 19th century for which immigration statistics were recorded.

U. S. IMMIGRATION
PERCENT BY COUNTRY
1820 - 1900

	Percent
Germany	26.2%
Ireland	20.3
Great Britian	15.8
Scandinavia	7.5
Italy	5.4
USSR	4.0
Balance of Europe	11.2
Latin America and Caribbean	0.9
Canada	5.5
Asia	2.0
Australia/New Zealand	0.1
Africa	*
All Other Countries	1.1
TOTAL	100.0%

* Less Than 0.1%

Source: Strategy Research Corporation

Germany, Ireland and England account for over 60% of the total and all of Europe encompasses 90% of the total immigration.

As the 19th Century came to a close, the immigration pattern began shifting. More and more immigrants began arriving from southern and eastern European countries, such as Italy, Austria, and Hungary.

Acquisition of Puerto Rico

Over the years since the awarding of independence to Mexico in 1821, nearly all its remaining colonies in the New World were granted independence by Spain. The two notable exceptions were Cuba and Puerto Rico, whose demands for independence had not been met.

As a result of the Spanish-American War, Cuba was granted independence.

However, Puerto Rico, which had been struggling for independence from Spain, found itself a possession of yet another country, the United States — one very different from itself. Its mixed culture of Hispanic, Indian and African elements were confronted with the same Anglo-Saxon Americans who had overwhelmed the Mexicans.

The beginning of the 20th Century found the U.S. stretching across a whole continent - growing up, developing, and flexing its muscles as a coming world power.

3. 1900 - 1950

This period encompasses a shift in immigration patterns, the last surge of unrestricted immigration, subsequent immigration controls, the growth of Hispanic population and Puerto Rican migration.

Immigration and Growth

The first 20 years of the 20th Century brought nearly as many immigrants to our shores as did the last 50 years of the 19th Century.

Immigration accounted for nearly one-half (48.9%) of the total increase in population, as seen in the following table:

U. S. POPULATION & IMMIGRATION
1790 -1980

As Of:	Total Population	Population Increase	Number Of Immigrants	Immigrants As Percent Of Total Increase
1790	3,930,000	—	—	—
1820	9,640,000	5,710,000	— *	—
1840	17,069,450	7,429,450	744,595	10.0%
1850	23,190,000	6,120,550	1,719,606	28.1
1900	75,995,000	52,805,000	16,659,405	31.5
1900-1920	105,710,600	29,715,600	14,531,197	48.9
1950	150,697,000	44,986,400	5,670,678	12.6
1970	203,235,300	52,538,300	5,837,156	11.1
1980	226,545,805	23,310,505	4,493,314	19.3

* Records not kept until 1820

Data available through 1984

Source: U.S. Bureau of the Census
U.S. Immigration & Naturalization Service
Strategy Research Corporation

Until the end of World War I, American industry welcomed and employed the immigrants as fast as they arrived. By 1920, industry had revolutionized, railroads were built, the West was settled, and unskilled labor was no longer in demand.

There was a dramatic shift in countries of origin of immigrants between 1820 - 1900 and the period 1900 - 1950. The number of immigrants from northwestern Europe dropped sharply while the numbers from countries of southern and eastern Europe rose.

The following table shows that the percentage of German-origin immigrants decreased from a high of 26.2% of total immigrants in the 1820 - 1900 period, to 6.1% of the total in the 1901 - 1950 period. The ratio of Irish immigrants dropped from 20.1% to 3.7% of the total.

On the other hand, Italians rose from 5.4% to 18.5% and Russians increased from 3.8% to 13% of total immigrants.

Latin American immigration grew from less than 1% to 5% of total immigrants arriving between these two periods.

IMMIGRATION BY MAJOR COUNTRIES & AREAS
1820 - 1950

	1820 - 1900		1901 - 1950	
	Number	Percent	Number	Percent
Germany	5,010,248	26.3%	1,238,281	6.1%
Ireland	3,873,104	20.3	726,032	3.6
Great Britain	3,028,151	15.8	1,379,016	6.8
Scandinavia	1,439,083	7.5	944,403	4.7
Italy	1,040,479	5.4	3,736,405	18.5
Austria/Hungary	1,027,195	5.4	3,144,909	15.6
Spain	41,361	0.2	131,660	0.7
U.S.S.R.	761,742	4.0	2,582,153	12.8
Other	1,058,726	5.5	1,926,938	9.5
Total Europe	17,280,089	90.4	15,809,797	78.3
Latin America	42,281	0.2	1,039,847	5.1
Caribbean (Non Spanish)	125,598	0.7	371,098	1.8
Canada	1,051,275	5.5	2,126,171	10.5
Asia	375,493	2.0	731,279	3.6
Australia/New Zealand	27,489	0.1	57,430	0.3
Africa	2,213	*	31,214	0.2
All Other Countries	219,168	1.1	35,040	0.2
TOTAL	19,123,606	100.0%	20,201,876	100.0%

* Less Than 0.1%

Note: Because of changes in boundaries and changes in lists of countries, data for certain countries are not comparable throughout.

Source: U.S. Immigration & Naturalization Service
Strategy Research Corporation

Immigration Restrictions

Prior to 1921 there were very few restrictions on immigration to the United States. Certain people, such as convicts and indigents, were excluded, and there were limitations on Asiatics. In large measure, anyone who could afford passage was allowed into the country. In 1907, 1,285,349 immigrants arrived in the U. S. - the record for any one year.

The Immigration Act of 1921 placed a numerical ceiling of 357,000 immigrants per year for countries outside the Western Hemisphere. Each country was allowed 3% of the number of persons of that nationality living in the U.S. in 1910. In 1924, the quota was changed to 2%, and the base year was lowered to 1890.

In 1929, the National Origins Law went into effect. This set a limit of 150,000 immigrants per year and stressed the country of birth rather than country where a person lived and applied for a visa. It also excluded Asian countries. The purpose of these changes was to prevent any large change in the basic makeup of the U.S. population.

These laws, along with the Depression, drastically reduced the number of immigrants in the 1930's.

Whereas the year 1907 saw 1.2 million people immigrating to the U. S., in the ten-year period from 1931 - 1940, an average of only 53,000 immigrants per year came to this country. More restrictive immigration laws and the worldwide depression combined to virtually stop immigration. Not since the 1820's had so few people immigrated to this country. The war years, 1941 - 1945, also saw few immigrants arrive.

Growth of Hispanic Populations

By 1930, the Hispanic population in the United States was over two million. Half were immigrants in the last generation; the other half descendants of early settlers who became U.S. citizens when Mexico ceded the Southwest.

In the early 1900's, thousands of Mexican laborers began coming to the U.S. to harvest crops, help complete the railroads, and find other employment. Eventually, they were to be found working across the country from steel mills in Pittsburgh to meat plants in Chicago. Many of these laborers left their families behind and returned home when they were able. Because of the high demand for labor, Mexicans simply crossed the border and immigration laws were ignored.

Most of the Mexican immigrants who arrived were poor laborers. Unfortunately, as the Depression swept the U.S. in the 1920's, these immigrants were the first to be out of work. Many communities found it was cheaper to send the Mexicans home than to pay welfare. A great many Mexicans returned to Mexico during this time, and in 1936, less than 10% of the seasonal labor available in 1920 was still available.

The onset of World War II revived a huge need for labor in the U.S. At that time the U.S. and Mexico established the Braceros Program, which sent thousands of Mexican laborers to the U.S. to work in factories and fields. In a two-year period, over 56,000 Braceros (laborers), came to the U.S. to work. Even that number did not fill all the available jobs, so many more Mexicans came into the country illegally.

Thousands of Mexican-Americans and Puerto Ricans joined the U.S. Armed Forces during the War. Many took advantage of the GI Bill of Rights to further their schooling and became trained in professional areas. These citizens became leaders in their communities, active in government and business.

Puerto Rican Migration

In 1917, the United States granted citizenship to Puerto Ricans. This began a large migration which has never ceased. Puerto Ricans, like Mexicans, came to work, to send money home, and eventually to return to Puerto Rico. Because Puerto Ricans are U.S. citizens, there is a constant migration to and from the island and their numbers are not included in immigration statistics.

During the war, migration from Puerto Rico was minimal. Beginning in 1946, immigration increased dramatically. A large number of Puerto Ricans went to New York City, as the established air and sea travel routes were basically between San Juan and New York. Also, New York City already established Puerto Rican barrios where family and friends lived.

Surprisingly, the second largest Puerto Rican population center in the U.S. prior to 1950 was San Francisco. Some of the earliest migration of Puerto Ricans was to Hawaii - to work in sugar cane fields and San Francisco was the debarkation point.

Overcrowding and unemployment on the Island of Puerto Rico was a major factor in the immigration patterns of Puerto Ricans to the U.S., prior to 1950. These reasons still hold today.

> "There are no jobs and things are very expensive."
> **Puerto Rico, man 26 years old.**

C. CURRENT IMMIGRATION PATTERNS AND UNDERLYING REASONS FOR THE IMMIGRATION

The forces affecting immigration are numerous and highly complex. Consequently, there are many reasons why people immigrate to the U.S. and no one knows all the specific underlying reasons. However, there are certain events and conditions which may explain the relatively strong desire of Latin Americans to come to the United States. These reasons are generally classified as political, social and economic causes and events.

In 1986, a random sample of Hispanics were interviewed and asked their reasons for leaving their countries. The following table gives a summary of major categories:

REASON GIVEN FOR
LEAVING COUNTRY OF RESIDENCE
U.S. HISPANIC IMMIGRANTS
1986

	Total
Economic/Employment	32.5%
Better Life	25.5
Family Reasons	21.6
Political	13.7
Other	17.7
TOTAL	*

* Multiple Response

Source: Strategy Research Corporation

These general categories do not reflect the depth of feeling expressed by those interviewed. The following quotations more graphically define these categories:

> "Our life was very bad economically."
> **Chile, man, 37 years old**

> "I got married and my husband lived here in New York."
> **Dominican Republic, woman, 24 years old**

> "I was looking for a better future for my daughter."
> **Ecuador, woman, 19 years old**

> "Communists kept my husband in prison for nine years.
> We had to get out."
> **Cuba, man and woman, 46 and 53 years old**

1. 1951 - 1984

Overall, from 1951 to 1984, immigrants from Latin America and Spain were the largest group of legal immigrants to the United States.

In addition, it is conceded that Latins also represent a majority of all illegal immigrants in the U.S. Also, from 1950 to the present, the U.S. has experienced a large influx of Puerto Ricans.

In this Section of the Report, we will discuss legal immigration by country for this period, as well as breaking it down (by country and area), in ten-year segments from 1951-1960, 1961-1970, and 1971-1980 and showing the most recent data available from the Department of Immigration and Naturalization - 1981-1984.

The following table shows a comparison, in ten-year increments, from 1951-1984 of Latin American immigration and all other immigration.

U.S. TOTAL IMMIGRATION BY MAJOR COUNTRIES & AREAS
1951 - 1984

	1951 - 1960		1961 - 1970		1971 - 1980		1981 - 1984		Total 1951 - 1984	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Europe:										
Germany	477,765	19.0%	190,796	5.7%	74,414	1.7%	29,838	1.3%	772,813	6.1%
Italy	185,491	7.4	214,111	6.4	129,368	2.9	17,859	0.8	546,829	4.4
United Kingdom	204,468	8.1	214,518	6.5	137,374	3.1	60,882	2.7	617,242	4.9
Ireland	48,362	1.9	32,966	1.0	11,490	0.3	4,048	0.2	96,866	0.8
Austria/Hungary	103,743	4.1	26,022	0.8	16,028	0.3	5,840	0.3	151,633	1.2
U.S.S.R.	584	0.0	2,336	0.0	38,961	0.9	33,248	1.4	75,129	0.6
Scandinavia	55,616	2.2	41,801	1.3	14,911	0.3	7,108	0.3	119,436	0.9
Spain	7,894	0.3	44,659	1.4	39,141	0.8	6,972	0.3	98,666	0.8
Other Europe	241,717	9.7	356,154	10.7	338,681	7.5	98,820	4.3	1,035,372	8.2
TOTAL EUROPE	1,325,640	52.7	1,123,363	33.8	800,368	17.8	264,615	11.5	3,513,986	27.9
Canada	377,952	15.0	413,310	12.4	169,939	3.8	47,026	2.1	1,010,227	8.0
Caribbean (Non Spanish)	34,391	1.4	167,613	5.0	324,533	7.2	167,674	7.3	694,211	5.5
Latin America										
Cuba	78,900	3.1	208,500	6.3	268,593	6.0	33,744	1.5	589,737	4.7
Dominican Republic	9,800	0.4	94,100	2.8	148,000	3.3	80,936	3.5	332,836	2.6
Mexico	299,811	11.9	453,937	13.7	640,294	14.2	274,273	12.0	1,668,315	13.2
Central America	44,751	1.8	101,330	3.0	134,640	3.0	100,362	4.4	381,083	3.0
South America	91,628	3.6	257,954	7.8	295,741	6.6	146,084	6.4	791,407	6.3
Other America	59,711	2.4	19,630	0.6	789	0.0	431	0.0	80,561	0.6
TOTAL LATIN AMERICA	584,601	23.2	1,135,451	34.2	1,488,057	33.1	635,830	27.8	3,843,939	30.4
Asia:										
China	9,657	0.4	34,764	1.0	124,326	2.8	134,371	5.9	303,118	2.4
India	1,973	0.0	27,189	0.8	164,134	3.7	92,328	4.0	285,624	2.3
Japan	46,250	1.8	39,988	1.2	49,775	1.1	16,408	0.7	152,421	1.2
Turkey	3,519	0.1	10,142	0.3	13,399	0.3	9,545	0.4	36,605	0.3
Other Asia	88,707	3.5	315,688	9.6	1,236,544	27.5	850,458	37.1	2,491,397	19.7
TOTAL ASIA	150,106	6.0	427,771	12.9	1,588,178	35.3	1,103,110	48.1	3,269,165	25.9
All Australia	16,204	0.6	21,331	0.6	25,594	0.6	8,163	0.4	71,292	0.6
All Africa	14,092	0.6	28,954	0.9	80,799	1.8	58,021	2.5	181,866	1.4
All Other Countries	12,493	0.5	3,884	0.1	15,866	0.4	7,968	0.3	40,211	0.3
TOTAL ALL COUNTRIES	2,515,479	100.0%	3,321,677	100.0%	4,493,334	100.0%	2,294,407	100.0%	12,624,897	100.0%

Notes: Because of changes in boundaries and changes in lists of countries, data for certain countries are not comparable throughout.

Source: U.S. Immigration & Naturalization Service
Strategy Research Corporation

Briefly, we will look specifically at Latin America in general, Cuba, Dominican Republic, Mexico, Colombia, and the Central American Countries. In trying to understand the root causes of recent immigration perhaps we can anticipate patterns of future immigration.

Immigration Patterns

From 1951 to 1984, the United States accepted 13 million immigrants. This was two-thirds as many as the 20 million accepted between 1900 - 1950 and the 19 million accepted between 1820 - 1900.

Over 30% were from Latin America and Spain, representing nearly four million immigrants, as seen on the table below.

**IMMIGRATION BY MAJOR COUNTRIES & AREAS
1820 - 1984**

	1820 - 1900		1901 - 1950		1951 - 1984		Total 1820 - 1984	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Germany	5,010,248	26.2%	1,238,281	6.1%	772,813	6.1%	7,021,342	13.5%
Ireland	3,873,104	20.3	726,032	3.6	96,866	0.8	4,696,002	9.0
Great Britain	3,028,151	15.8	1,379,016	6.8	617,242	4.9	5,024,409	9.7
Scandinavia	1,439,083	7.5	944,403	4.7	119,436	0.9	2,502,922	4.8
Italy	1,040,479	5.4	3,736,405	18.4	546,829	4.4	5,323,713	10.2
Austria/Hungary	1,027,195	5.4	3,144,909	15.6	151,633	1.2	4,323,737	8.3
Spain	41,361	0.2	131,660	0.7	98,666	0.8	271,687	0.5
U.S.S.R.	761,742	4.0	2,582,153	12.8	75,129	0.6	3,419,024	6.6
Other	1,058,726	5.5	1,926,938	9.5	1,035,372	8.2	4,021,036	7.8
Total Europe	17,280,089	90.4	15,809,797	78.2	3,513,986	27.9	36,603,872	70.4
Latin America	42,281	0.2	1,039,847	5.2	3,843,939	30.4	4,926,067	9.5
Caribbean (Non Spanish)	125,598	0.7	371,098	1.8	694,211	5.5	1,190,907	2.3
Canada	1,051,275	5.5	2,126,171	10.5	1,010,227	8.0	4,187,673	8.1
Asia	375,493	2.0	731,279	3.6	3,269,165	25.9	4,375,937	8.4
Australia/New Zealand	27,489	0.1	57,430	0.3	71,292	0.6	156,211	0.3
Africa	2,213		31,214	0.2	181,866	1.4	215,293	0.4
All Other Countries	219,168	1.1	35,040	0.2	40,211	0.3	294,419	0.6
TOTAL	19,123,606	100.0%	20,201,876	100.0%	12,624,897	100.0%	51,950,379	100.0%

Note: Because of changes in boundaries and changes in lists of countries, data for certain countries are not comparable throughout.

Source: U.S. Immigration & Naturalization Service
Strategy Research Corporation

Latin America in General

> "Life got very hard and no work. Nada."
> **Venezuela, woman, 33 years old**
>
> "Here is opportunity."
> **Panama, man, 26 years old**
>
> "There are jobs in this country. The economy is better."
> **Honduras, man, 37 years old**

In its July 1986 bulletin, "Population Pressures in Latin America," the Population Reference Bureau observes that in 1950 the Latin American population of 165 million was on a par with the 166 million population of the U.S. and Canada combined. By 1985, it was one and a half times the U.S./Canada population — 405 million versus 264 million. By 2025, according to United Nations medium projections, it could be over twice as large — 779 million versus 345 million. According to the Bureau's "1986 World Population Data Sheet" the population "doubling time" for Latin America, at current rate, is only 30 years, whereas for U.S./Canada it is 98 years.

Recent economic downturns, declining oil prices, and characteristic income and political inequality and instability add to increasing pressures for northward migration to the U.S. The search for jobs, coupled with political turmoil in Central America, has led to a large flow of Latin migration to the U.S.

The next table presents Latin American and Spanish (legal) immigration by country for the 1951 - 1984 period. The leading contributor countries were Mexico (42% of total), Cuba (15%), and the Dominican Republic (8%) during this 34-year period.

LATIN AMERICAN AND SPANISH IMMIGRATION BY COUNTRY OR REGION OF LAST RESIDENCE
1951 - 1984

Origin	1951 - 1960		1961 - 1970		1971 - 1980		1981 - 1984		1951 - 1984	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Mexico	299,811	50.6%	453,937	38.5%	640,294	41.9%	274,273	42.7%	1,668,315	42.3%
Cuba	78,900	13.3	208,500	17.7	268,593	17.5	33,744	5.2	589,737	15.0
Dominican Republic	9,800	1.7	94,100	8.0	148,000	9.7	80,936	12.6	332,836	8.4
Argentina	19,486	3.3	49,721	4.2	29,897	2.0	8,617	1.3	107,721	2.8
Brazil	13,783	2.3	29,272	2.5	17,842	1.2	6,778	1.1	67,675	1.7
Colombia	18,048	3.0	72,028	6.1	77,348	5.1	39,498	6.1	206,922	5.2
Ecuador	9,841	1.7	36,780	3.1	50,078	3.3	17,743	2.8	114,442	2.9
Peru	7,404	1.2	19,052	1.6	29,171	1.9	17,468	2.7	73,095	1.9
El Salvador	5,895	1.0	14,992	1.3	34,436	2.3	32,666	5.1	87,989	2.2
Guatemala	4,663	0.8	15,883	1.3	25,882	1.7	15,606	2.4	62,034	1.6
Panama	11,680	2.0	19,350	1.6	23,528	1.5	13,722	2.1	68,280	1.7
Other Central America	22,513	3.8	51,105	4.3	50,794	3.3	38,368	6.0	162,780	4.1
Other Latin America	82,777	14.0	70,731	6.0	92,194	6.0	56,411	8.8	302,113	7.7
Spain	7,894	1.3	44,659	3.8	39,141	2.6	6,972	1.1	98,666	2.5
TOTAL LATIN AMERICAN AND SPANISH IMMIGRATION	592,495	100.0%	1,180,110	100.0%	1,527,198	100.0%	642,802	100.0%	3,942,605	100.0%

Source: U.S. Immigration & Naturalization Service
Strategy Research Corporation

Over this time, Mexico declined somewhat in relative importance; Cuba's share increased somewhat; and that of the Dominican Republic increased substantially.

Mexico

> "We were so poor, hungry and suffering from malnutrition."
> **Mexico, family**
>
> "I wanted a good, happy life here. My kids have food to eat and I have work."
> **Mexico, man, 26 years old**

Mexicans have long enjoyed an interaction and relationship with relatives on each side of the border and have regarded the United States as a compatible land of opportunity. In the last 30 years, immigration from Mexico accounted for nearly half of the total Hispanic legal immigration to the U.S.

Mexico discovered that it had great oil reserves, and borrowed against them to improve its economy and the lot of its people. For a few years the economy prospered. But oil prices have dropped, and optimism evaporated. In Mexico, oil revenues which were to pay loans were not being realized, and lenders realized that their losses were not well secured.

In recent years, the government nationalized the banking system, inflation was high and the value of the peso fell dramatically. The economy slowed and many Mexicans again looked to the U.S. for jobs, incomes and opportunities, entering the U.S. legally and illegally.

Dominican Republic

> "No money. No job. No hope. I stay."
> **Dominican Republic, youth, 23 years old**

While political upheaval may have been the original impetus for people to leave the country, poor economic conditions and lack of opportunity have been continuing incentives for them to leave.

This country on the island of Hispaniola has sent the third largest number of immigrants to the U.S., since 1951 and, during the eighties it has taken over second place among Latin countries from Cuba. The recent flow of immigrants from the Dominican Republic began with the assassination of General Trujillo in 1961, and continues unabated.

In the 1960's, the U.S. Marines were sent to quell civil disturbances. The apparent interest of the U.S. in its peace-keeping role sent a signal to the Dominican population that the U.S. would offer asylum, protection and opportunity to Dominicans who felt that their opportunities were severely limited in the Dominican Republic.

Cuba

> "I came to the lamp, yearning to be free. I left a profession to start over again as a cab driver. Now I am back as a professional."
> **Cuba, man, 65 years old**

> "Looking for freedom. I am someone without a country, but I am free!"
> **Cuba, woman, 47 years old**

After the takeover of Cuba by Castro, thousands of Cubans emigrated to the United States. Not since the Jews fled Europe to escape annihilation by Hitler have so many of the ruling class of a country emigrated.

The opening of U.S. shores to Cuban political refugees in the 1960's sent a positive signal to potential political refugees from Argentina to Mexico and from the Dominican Republic to Chile. Residents of other countries who fled political oppression could anticipate the same treatment as Cuban political refugees received.

In 1962, diplomatic relations between the United States and Cuba were severed. This left Cubans who wanted to leave with the option of flying to Mexico or Spain (or they could escape by boat) and then applying for admission to the United States.

In 1965 Castro announced that all who wanted to leave could leave. President Johnson authorized "Freedom Flights" which brought 270,000 Cubans to Miami between 1965 - 1973.

When the Immigration Act of 1965 limited the number of immigrants from each country, Cuban refugees were given a special Refugee Status. These refugees were admitted without visas and were eligible to apply for permanent residency status after they had lived in the United States for two years. Immigration figures for Cubans only reflect those who have made this application.

In April, 1980 Castro again announced that anyone who wished to leave Cuba could leave. According to the U.S. Department of Justice, Community Relation Service, 124,789 Cubans entered the U.S. between April 21 and October 10, 1980.

These "Marielitos," as they are known (from the Cuban town of departure, Mariel) to distinguish them from the original Cuban refugees, created a new challenge for the U.S. They had spent 20 years under a communist regime and some had difficulty adapting to their new country. Also, Castro had emptied prisons and mental hospitals sending "undesirables." This caused resentment against Marielitos by Americans and Cubans alike.

Nearly 87% of the Marielitos have settled in Florida, which once again has accepted the burden of assisting these thousands of people to become self-sufficient and productive citizens.

Central America

> "My life became too complicated there. I could not live in peace."
> **Nicaragua, man, 31 years old**

> "Life is very hard in my country."
> **El Salvador, man, 31 years old**

> "The poverty, the government corruption and the political persecution."
> **Guatemala, woman, 49 years old**

The countries of Nicaragua, El Salvador and Guatemala have a history of political and economic upheavals.

Thomas P. Anderson, in his book, Politics and Opinions in Central America, offers some background for the underlying conditions that exist in Central America:

> "Each of these governments was republican in form, with a presidential system generally modeled on that of the United States. But while it was possible to import the forms of such a government, it proved impossible to impart much of the spirit. . .
>
> The constitutions of Central America, both in the nineteenth century and in the twentieth, have reflected the confusions arising from the grafting of an alien governmental structure onto a Hispanic legal system. . .
>
> This means that almost every major governmental upheaval, through coup or civil war, results in a new constitution being established. . . They represent an ideology rather than a simple set of rules for governing.
>
> Whatever the constitution might say, the fact is that the president generally concentrates most of the authority of the republic in his own hands. This may be, as some authorities declare, because of the traditional Hispanic need for caudillos. Strong, often military leaders, exhibit the traditional macho virtues and pass out awards to their enemies. . .When constitutions are so constricting that nothing can be accomplished within their framework, the temptation of the executive branch will be to rule by decree, outside constitutional restraints.

. . .To begin with, like much of Hispanic America, this is a death-oriented society. Poverty and malnutrition combine to insure a very high infant-mortality rate. Death becomes a constant and familiar companion. . .Life being brief, the emphasis shifts from prolonging one's life to living and dying in a heroic manner. . . The best death is that which gives one the chance to display one's manhood to the fullest. Here the concept of machismo is very important. It is a term against which most North Americans take offense, but it is a very real part of the regional culture of the Central America and does not mean the kind of swaggering bravado that comes to our minds.

Rather, machismo is the noble defiance of death. It is the willingness to dare, to take physical risks, in the face of hopeless odds. Therefore, it has more to do with Don Quixote than with Don Juan. No one has put it as well as Julius Rivera has in his brilliant study, when he wrote:

'A Macho gambles with Destiny, ready to win or lose. He gambles with death, he gambles with God. A burning love affair is a victory over death; sin a victory over God. When the three come together, man has accomplished his fulfillment.'

Skill in arms and pride in their possession are traits in latino society handed down from the time of the conquistadores. Every poor man has his machete; every man who can afford it, his firearms.

. . . These tendencies can be exaggerated, but acceptance of violence as the normal means of settling disputes, including political ones, is what sets the two cultures apart. The golpe de estado (or coup d'etate) and the cuartelazo (or barracks uprising) are not regarded as aberrations, but rather as normal parts of the political process and sometimes the only, or best, way of affecting change."[1]

[1] Thomas P. Anderson, Politics in Central America, (New York: Praeger Publishers, 1982), pp. 3-5; pp. 13-14.

Mr. Anderson's explanation of the political system and the peoples' outlook, gives one view of the causes of unrest which are so hard for people in the U.S. to understand. He may or may not be entirely correct.

In Nicaragua, the Somoza family ruled for over 40 years, until a civil war, resulted in the ouster of President Somoza in 1979. A ruling junta of the Sandinistas then took over the country. Over half a million people were displaced because of the war and many more were greatly impoverished as the economy, mostly agrarian, virtually collapsed.

Many people emigrated to the U.S., and many thousands more have fled as refugees to Mexico. From there, many have made their way over land to the U.S.

Civil strife continues, and many Nicaraguans have entered the U.S. illegally. Although they consider themselves political refugees, the U.S. does not recognize a refugee status for them, making them subject to deportation if they are apprehended.

El Salvador is the most densely populated country on the American continent with an impoverished agrarian economy which cannot support its population.

Many people may dislike the government of a country but not decide to leave. However, a poor economy which is unable to provide even the basic needs of a people, will provide impetus for people of all types to emigrate.

Many thousands of people from El Salvador have moved to Mexico and Honduras. Salvadoreans are making their way to the U.S., primarily to California, in increasingly large numbers.

Guatemala is the largest and potentially the wealthiest of the Central American Republics. It is really two countries in one, Spanish and Indian.

The Indian peasants account for nearly one-half of the population and are at the root of the low economic status of the country. Illiteracy is over 50% as the Indians maintain their ancient ways of their Mayan ancestors.

The "Spanish" country has a diversified and stronger economy and Guatemala has more industrial opportunities than other Central American countries. However, even with these positive considerations, there is still civil unrest and persons from Guatemala are immigrating to the U.S. at a rate similar to other Central American countries.

South America

> "I wanted to learn English and have a better life."
> **Peru, woman, 20 years old**

> "The poverty, the necessity, the desire and longing I had to move ahead with my family."
> **Ecuador, man, 46 years old**

"I like the system in the U.S. It is very good."
Uruguay, woman, 35 years old

Colombia has faced approximately 40 years of civil and social unrest manifested by open clashes between government supporters and leftist guerillas. It has a very high rate of population growth which, combined with the constant civil and social unrest, provides an impetus for emigration.

Other South American countries have experienced economic and political unrest. Chile is coming through the first decade of a bloody revolution.

Argentina is in a transition period from a dictatorship, to civilian government. Venezuela and Ecuador have prospered along with other oil producing nations but suffered with the decrease in oil prices and faltering economies.

Current Immigration Regulation

In 1965 the United States rewrote its Immigration Act. This Act abolished the ratio system by country and set a numerical limitation of 170,000 persons per year from Eastern Hemisphere countries and 120,000 per year from Western Hemisphere countries, with a 20,000 limit per country. This was the first restriction placed on immigration from Western Hemisphere countries.

While there has always been an undetermined number of people entering this country illegally, this limitation has created a backlog of applicants for visas in the Latin American countries and has created a situation in which many are unwilling to wait. These people enter the country by a variety of means. Some, of course, are smuggled in, but many others enter legally on student, tourist, or temporary work visas and blend into the Hispanic communities when their visas expire.

In the April, 1986 issue of "Population Today," the Population Reference Bureau observed that a record number of illegal immigrants are currently entering the United States:

> "Mexican illegal aliens are crossing the border into the U.S. in record numbers, according to the U.S. Immigration and Naturalization Service (INS). The migration flow has doubled at some southern entry points in recent months.
>
> In January 1986 the Service apprehended 131,500 illegals on the Mexican border, a 53-percent jump over the same month in 1985. With 1.2 million border apprehensions, 1985 was a record year. The INS projects that 1986 will see 1.8 million apprehensions.

> Increases in the Border Patrol along the southern border - to 2,629 agents - is given as one reason for the increase. But the principal cause is believed to be the difficult Mexican economic situation, in recent months exacerbated by the Mexico City earthquake and by the plunge in world oil prices. The latter has drastically reduced the income from oil fields and threatens Mexico's ability to pay its international debt.
>
> The U.S.-Mexican border is a world anomaly -- a unique instance of a prosperous more developed country bordering directly on a populous less developed one. Needless to say, apprehensions account for only part of the presumed migration northward — an informal, unprovable rule of thumb posits that for every alien apprehended, one (or two, or three) passes through undetected. The U.S. Census Bureau recently changed its population estimation process to include the hypothetical component of 200,000 illegal migrants entering the U.S. each year."

The 1986 Immigration legislation, by providing amnesty for illegal aliens who have lived in the U.S. for five years, and penalties for employers who knowingly hire undocumented workers, is attempting to deal with this problem. Only time will tell if the implementation of this law will reduce the flow of persons entering this country illegally.

Assimilation

Throughout the history of the United States each group of immigrants objected to the next because of cultural differences. Gradually, however, each new group adapted itself to the other(s), inter-married, and blended into the whole.

Early Mexican-American settlers have assimilated to a large degree. The American Southwest, and California, are good examples of two cultures blending together with the best features of both being adopted by all. While these early Mexican-Americans have become "Americanized," the large number of recent arrivals from Mexico keep them aware of their language, culture, and heritage.

The Mexicans who have arrived in this century have come, not because they were forced to escape persecution, but to seek opportunities just as any American might move to seek a better job. These personal economic reasons allow for the possibility of a return home.

Puerto Ricans enjoy considerable freedom to work in the U.S. and return home to visit or retire, should they wish to do so.

The Cubans, on the other hand, were fleeing political persecution and have had little opportunity to return to Cuba. The large number of Cubans who arrived in the U.S. in a short period of time permitted a great deal of needed reinforcement among the refugees to help lessen the cultural shock of being wrenched from their homeland and thrust into a different way of life.

Even as they gradually realized a return home was not going to happen suddenly, they showed a sense of heritage and culture which they did not want their American-born children to forget. Thus, as they learned English and adapted on their jobs to American ways, they still spoke Spanish at home, in the marketplace, and taught their children to speak it.

Business and tourism from Spanish countries are a constant reinforcement to the U.S. Hispanic population of its Spanish heritage.

As the world becomes smaller, with increased travel and communication in all areas, it becomes desirable to have a second language.

The following table shows that the Spanish language is the fourth most frequently spoken language after Chinese, English and Hindi.

11 MAJOR LANGUAGES OF THE WORLD
(AS OF MID-YEAR 1985)
(IN MILLIONS)

	Language	Millions of Persons
1	Mandarin (China)	771
2	English	415
3	Hindi	287
4	Spanish	285
5	Russian	282
6	Arabic	171
7	Bengali (Bangladesh, India)	166
8	Portuguese	161
9	Japanese	121
10	Malay-Indonesia	125
11	German	118

Source: The World Almanac, 1986

When we consider these eleven major languages we can see that Spanish is the most desirable Western language to know after English. The bilingual Hispanics in our country can communicate with more people in the world than anyone except the Chinese. Those who drop Spanish completely and adopt English are the poorer for it; Spanish-speaking people across the country realize this.

The recent surges of immigrants from Latin America coincide with the upsurge in individual human rights. Each person is encouraged to take pride in and recognize his/her own roots and heritage. Thus, rather than being encouraged to become strictly Americans, immigrants/ethnic groups are encouraged to maintain their heritage and culture.

Perhaps the most significant factor influencing the assimilation process today is the ability of current immigrants to return to their homelands if they wish to do so.

This travel and communication back and forth reinforce the language and cultural ties. Not only those who actually travel are affected. The simple proximity and number of Spanish countries near the United States create a constant awareness of the heritage.

Assimilation has been slow because of the large numbers of recent arrivals and will never equal the absorption of other earlier groups of immigrants. The importance of multi-language capabilities, pride of individual roots and heritage, increased flow of tourists and business between the United States and Latin America, the ability to return home, and the proximity of Latin countries are among the reasons.

Conclusion

Immigration has made America stronger, richer, more diverse and free-thinking, and more colorful than countries who maintain strict controls over emigration and immigration.

A typical scenario is for an immigrant family to come to this country and settle in a ghetto, then to rise from menial jobs to full acceptance in the mainstream as each generation becomes more Americanized.

New immigrants achieve the American dream through invention, private enterprise, ethnic retailing, the educational process, and hard work.

Ethnic groups represent an appealing market segment as they are eager to accept those companies and products which are eager to embrace their patronage. The more an advertiser knows about a targeted consumer group, the more effective that advertising can become.

Hopefully, this report by Strategy Research Corporation will provide some of the hard data needed to successfully sell to the U.S. Hispanic market.

III. POPULATION AND DEMOGRAPHIC PROFILE

III. POPULATION AND DEMOGRAPHIC PROFILE

An estimated 18,877,100 Hispanics will be living in the United States in 1987. This represents 7.5% of the total U.S. population estimate of 250,107,900 persons.

In 1980, a total of 14,603,700 Hispanics resided in the United States. Thus, from 1980 to 1987, the Hispanic population of the U.S. grew by approximately 29%. Given reasonable assumptions of fertility, mortality and past immigration experience, Hispanic population will reach 21 million by late 1990 and approximately 27 million by the year 2000.

Many factors contribute to the rapid growth in Hispanic population. Among the primary factors contributing to this growth are the larger Hispanic family (3.5 persons to 2.7 for the total U.S.), younger age (Hispanic median = 23.6, U.S. median = 30.0), the higher birth rate of U.S. Hispanics in comparison to the general population and the continuous legal and illegal immigration to the United States from Spanish-speaking countries. At least through the remainder of the eighties, it is expected that this growth will continue and perhaps accelerate.

The Hispanic population in the United States has gradually come to be accepted as part of American society. They have demonstrated their permanence as a distinct cultural group within the United States. Particularly in the large urban areas, Hispanics have created their own neighborhoods and influenced the structure and development of the communities in which they live.

U.S. Hispanics have the highest median family income of any Hispanic country in the world. U. S. Hispanic income is estimated at $22,900, compared to $32,800 for the general population. Cuban-Americans have the highest incomes of all U.S. Hispanics. In 1987 their median family income is estimated at $27,500, 84% of the U.S. median. Puerto Rican-Americans register the lowest median income among Hispanic families ($15,000).

With regard to educational attainment, the trend toward greater academic achievement and increased penetration of professional and managerial occupations is expected to continue. Currently, 8.4% of all U. S. Hispanic heads of household have completed one or more years of college; the percentage who are presently employed in white collar professions stands at 15.7%.

The increased economic and educational participation of Hispanics in American society has been accomplished without abandoning the Spanish language. For the 18.9 million Hispanics living in the U.S. today, Spanish is still the primary language spoken.

The recent "Discovery" and growing appreciation of the Hispanic population as a distinct market segment reflects the sense of permanence attributed to the Hispanic community by American society. For the most part, Hispanics in the United States have realized that they can participate in the mainstream of American society without having to sacrifice their Hispanic identity.

A. WORLD RANK

Mexico, with an estimated population of 81.7 million persons, is the number one ranked Hispanic country in the world in terms of population.

Second to Mexico in Hispanic population is Spain (38.8 million persons), followed by Argentina which has an estimated population of 31.2 million persons.

Strategy Research Corporation's estimated 1987 Hispanic population of the United States is 18.9 million persons. This makes the United States the sixth largest Hispanic populated country in the world, with 1.1 million more Hispanics than seventh-ranked Venezuela. The U.S. Hispanic population is 6% larger than the population of Venezuela and approximately 54% larger than the population of Chile (the eighth ranked country) and 85% larger than Cuba (the ninth ranked).

U.S. HISPANIC POPULATION VERSUS OTHER HISPANIC COUNTRIES* 1987

Country	Population (In Millions)	Rank
Mexico	81.7	1
Spain	38.8	2
Argentina	31.2	3
Colombia	30.0	4
Peru	20.2	5
United States	**18.9**	**6**
Venezuela	17.8	7
Chile	12.3	8
Cuba	10.2	9
Ecuador	9.6	10
Guatemala	8.6	11
Dominican Republic	6.4	12
Bolivia	6.4	13
El Salvador	5.1	14
Honduras	4.6	15
Paraguay	4.1	16
Puerto Rico	3.3	17
Nicaragua	3.3	18
Uruguay	3.0	19
Costa Rica	2.7	20
Panama	2.2	21

* Portugal (pop. 10.1 mil) and Brazil (pop. 143.3 mil) are not included in definition of term "Hispanic."

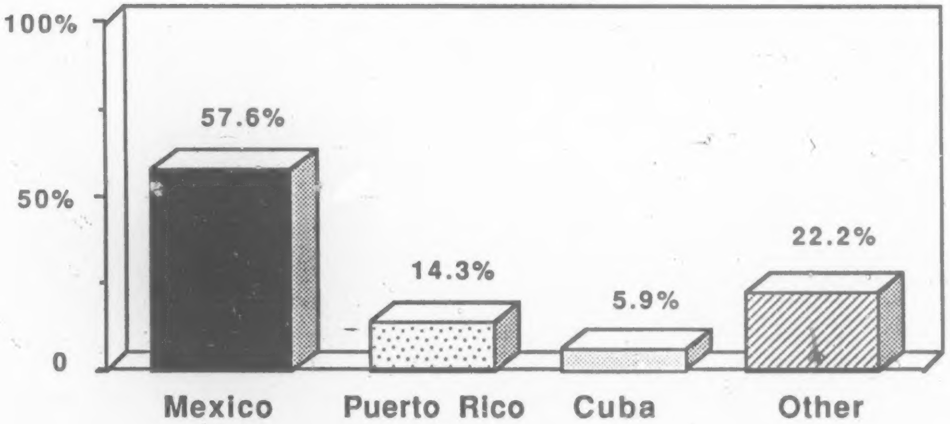
Source: Population Reference Bureau, Inc.
Strategy Research Corporation

B. COUNTRY OF ORIGIN

Self-classification is the method utilized by the U.S. Bureau of the Census in determining ethnic background. A person is of Spanish/Hispanic origin or descent if the person identifies his or her ancestry with one of the listed groups, that is, Mexican, Puerto Rican, etc. Origin or descent (ancestry) may be viewed as the nationality group, the lineage, or country in which the person or person's parents or ancestors were born.

Of the 18.9 million Hispanics in the United States today, the majority (10.9 million) are of Mexican origin. This is more than four times the size of the second largest group of Hispanics (Puerto Ricans) and almost ten times larger than that of Cuban origin.

Country of Origin
U.S. Hispanic Population
1987



Source: Strategy Research Corporation

In terms of percentage distribution, Mexican-Americans currently comprise the greatest percentage of Hispanics (57.6%) in the United States.

Puerto Rican-Americans comprise 14.3% of the total Hispanic population.

COUNTRY OF ORIGIN
U.S. HISPANIC POPULATION
1987

Nationality	Number (000)	Percent Of Total
Mexican	10,873.2	57.6%
Puerto Rican	2,699.4	14.3
Cuban	1,115.1	5.9
Other Hispanic	4,189.4	22.2
TOTAL	18,877.1	100.0%

Source: Strategy Research Corporation

Persons of Cuban origin represent the third largest percentage of Hispanics in the United States (5.9%), while those from places such as Central and South American countries constitute roughly 22% of the total.

When viewing percentage increase from 1980 to 1987, a large increase is seen for the Cuban segment (38.3%). This is due largely to the Mariel boatlift from Cuba in the Spring and Summer of 1980, as well as the political upheaval of Castro's regime and the increased economic opportunity in the United States.

COUNTRY OF ORIGIN
U.S. HISPANIC POPULATION
PERCENTAGE INCREASE
1980 - 1987

Nationality	1980 Number Of Persons (000)	1987 Number Of Persons (000)	Percent Increase 1980 - 1987
Mexican	8,678.6	10,873.2	25.3%
Puerto Rican	2,005.0	2,699.4	34.6
Cuban	806.2	1,115.1	38.3
Other Hispanic	3,113.9	4,189.4	34.5
TOTAL	14,603.7	18,877.1	29.3%

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The number of persons of Puerto Rican origin increased by 34.6% since 1980, while the U.S. Mexican population increased in size by 25.3%.

Other diverse Hispanic groups also attributed to a 34.5% increase in the period 1980 to 1987.

Natural growth and in-migration are contributing factors, however, in recent years the U.S. Hispanic population has grown due to political and economic conditions in several Spanish-speaking countries. For example, the arrival of political refugees from Cuba, Nicaragua, and El Salvador, and economic refugees from Argentina, Brazil, Mexico and other Latin countries have influenced the overall Hispanic growth.

The following table further exemplifies the Hispanic pattern of growth.

COUNTRY OF ORIGIN
U.S. HISPANIC POPULATION
1980, 1985, 1987

Nationality	1980 Number Of Persons (000)	1985 Number Of Persons (000)	1987 Number Of Persons (000)	Growth 1980 - 1987 (000)	Growth 1980 - 1987 Percent	Growth 1985 - 1987 (000)	Growth 1985 - 1987 Percent
Mexican	8,678.6	10,406.2	10,873.2	2,194.6	25.3%	467.0	4.5%
Puerto Rican	2,005.0	2,398.9	2,699.4	694.4	34.6	300.5	12.5
Cuban	806.2	1,018.6	1,115.1	308.9	38.3	96.5	9.5
Other Hispanic	3,113.9	3,739.0	4,189.4	1,075.5	34.5	450.4	12.0
TOTAL	14,603.7	17,562.7	18,877.1	4,273.4	29.3%	1,314.4	7.5%

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

From 1985 to 1987, the United States experienced a growth in Hispanic population of 467,000 Mexican-Americans, 450,400 Other Hispanic-Americans, 300,500 Puerto Rican-Americans, and 96,500 Cuban-Americans.

Geographically, both the Southeast and Southwest regions are clearly dominated by specific Hispanic groups. Ninety-one percent of the Hispanics living in the Southwest are of Mexican origin, while 79.2% of the Hispanics living in the Southeast are of Cuban origin.

In the Northeast, Puerto Rican-Americans comprise 59.2% of the Hispanic population, while Dominicans also constitute a large portion of the Hispanic base (24.2%).

1987
U.S. HISPANIC POPULATION
COUNTRY OF ORIGIN
BY MARKET REGION

	Northeast	Southeast	Central	Southwest	California
Cuba	1.6%	79.2%	2.7%	0.6%	5.1%
Mexico	0.2	0.9	63.1	90.9	75.3
Puerto Rico	59.2	2.4	21.4	0.1	0.4
Central/South America	13.8	13.9	11.9	4.7	16.8
Dominican Republic	24.2	1.4	0.7	0.0	0.1
Spain	0.0	1.8	0.2	2.7	1.7
Other	1.0	0.4	0.0	1.0	0.6
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

In the California region, 75.3% of the Hispanic population is persons of Mexican descent; 16.8% of the area's Hispanic base is comprised of Hispanics from Central and South American countries.

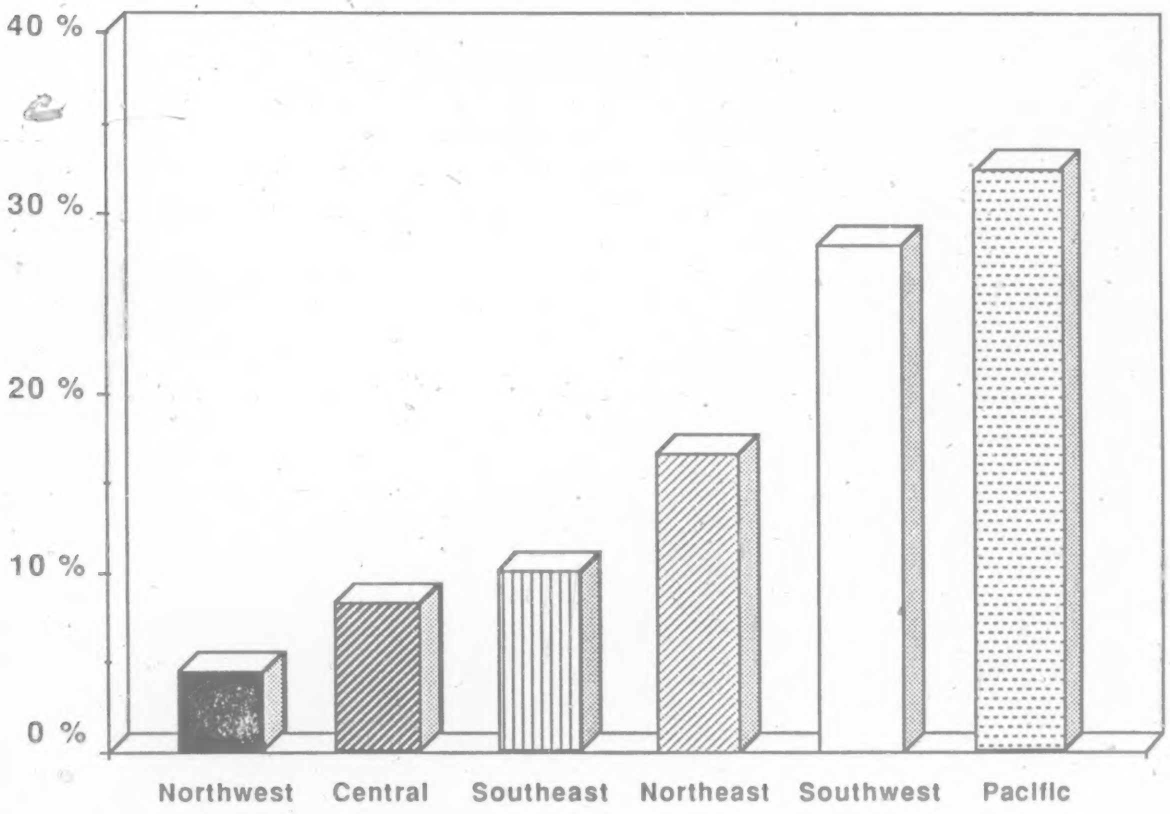
The Central portion of the United States is dominated by Mexican-Americans who currently comprise 63.1% of the Hispanic population base. Puerto Rican-Americans account for 21.4% of the Central region's Hispanic population, while 11.9% of the population is of Central or South American descent.

C. POPULATION BY REGION AND STATE

Five states in two regions account for 61% of the total 1987 U.S. Hispanic population. Specifically, Arizona/New Mexico/Texas (Southwest region) and California/Hawaii (Pacific region) have an estimated 11,471,600 Hispanic residents.

Meanwhile, the U.S. region which contains the fewest Hispanics is the Northwest. This region, which encompasses six states, has an estimated Hispanic population of less than one million (827,500) -- this figure represents 4.4% of the total U.S. Hispanic population.

1987
U.S. Hispanic Population
Percent of Total Hispanic Population
By Geographical Region



Source: Strategy Research Corp.

Numerically, the region which contains the third highest concentration of Hispanics is the Northeast, where 3,145,500 Hispanics live (16.7% of the U.S. total). The Southeast and Central regions account for 10.0% and 8.2%, respectively, of the U.S. Hispanic population total.

U.S. HISPANIC POPULATION
BY GEOGRAPHIC REGION
1980, 1985, 1987

Region	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Northeast	2,608.2	2,841.0	3,145.5
Southeast	1,411.0	1,682.9	1,887.6
Central	1,344.8	1,434.8	1,544.9
Southwest	3,903.8	4,926.4	5,342.8
Northwest	723.2	809.8	827.5
Pacific	4,612.7	5,867.8	6,128.8
TOTAL	14,603.7	17,562.7	18,877.1

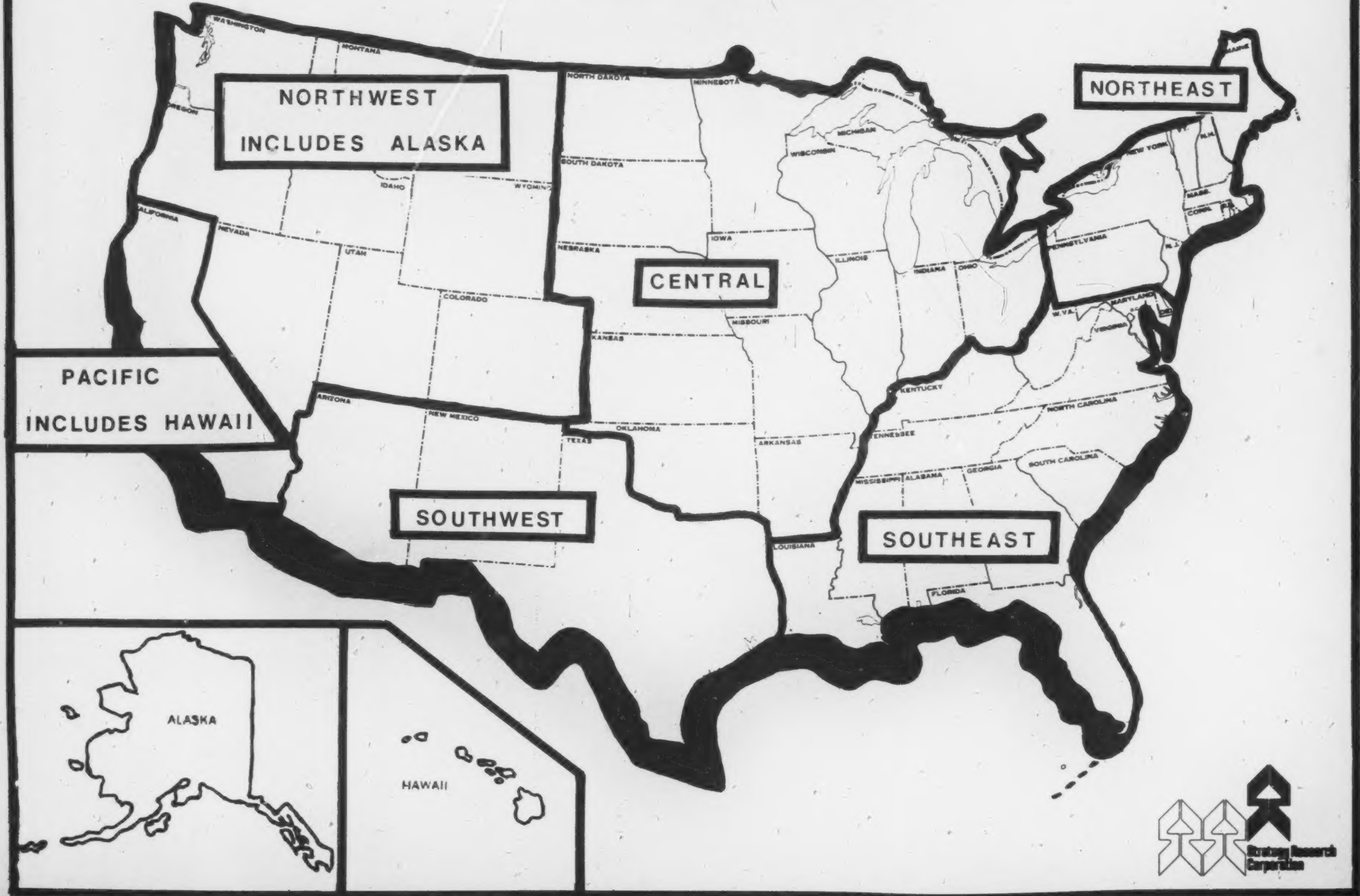
Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The Southeast region experienced the greatest percentage increase in Hispanic population growth since 1985. Hispanic population in this region increased by 12.2% or 204,700 persons.

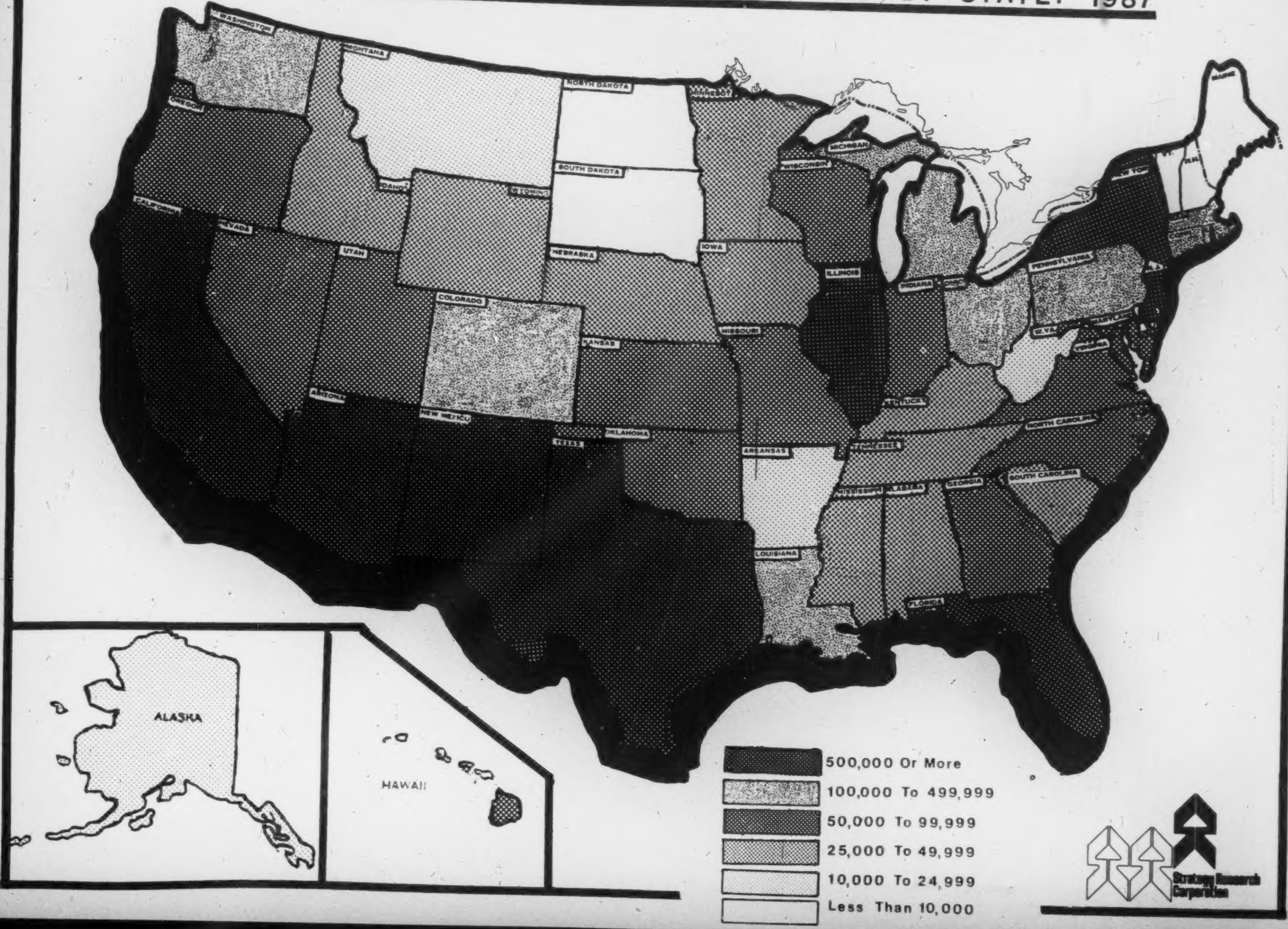
Second in Hispanic population growth in the past two years is the Northeast region, which experienced the arrival of approximately 304,500 new residents for an increase of 10.7%.

The first map which follows delineates the U.S. geographical regions, and the second one illustrates the concentration of Hispanic population by state within region.

GEOGRAPHIC REGIONS


NORTHWEST
INCLUDES ALASKA
PACIFIC
INCLUDES HAWAII
CENTRAL
SOUTHWEST
SOUTHEAST
NORTHEAST
WASHINGTON
MONTANA
OREGON
IDAHO
WYOMING
CALIFORNIA
NEVADA
UTAH
COLORADO
ARIZONA
NEW MEXICO
TEXAS
NORTH DAKOTA
SOUTH DAKOTA
NEBRASKA
KANSAS
OKLAHOMA
MINNESOTA
IOWA
MISSOURI
ARKANSAS
LOUISIANA
WISCONSIN
MICHIGAN
ILLINOIS
INDIANA
OHIO
KENTUCKY
TENNESSEE
MISSISSIPPI
ALABAMA
GEORGIA
FLORIDA
SOUTH CAROLINA
NORTH CAROLINA
VIRGINIA
W.VA.
MARYLAND
PENNSYLVANIA
NEW YORK
N.J.
CONN.
R.I.
MASS.
VT.
N.H.
MAINE
ALASKA
HAWAII
Strategy Research Corporation

NUMBER OF HISPANIC PERSONS BY STATE: 1987


WASHINGTON
OREGON
CALIFORNIA
NEVADA
IDAHO
MONTANA
WYOMING
UTAH
ARIZONA
COLORADO
NEW MEXICO
NORTH DAKOTA
SOUTH DAKOTA
NEBRASKA
KANSAS
OKLAHOMA
TEXAS
MINNESOTA
IOWA
MISSOURI
ARKANSAS
LOUISIANA
WISCONSIN
MICHIGAN
ILLINOIS
INDIANA
OHIO
KENTUCKY
TENNESSEE
MISSISSIPPI
ALABAMA
GEORGIA
FLORIDA
SOUTH CAROLINA
NORTH CAROLINA
VIRGINIA
W. VA.
MARYLAND
PENNSYLVANIA
NEW YORK
N.J.
VT.
N.H.
MAINE
ALASKA
HAWAII
■ 500,000 Or More
▨ 100,000 To 499,999
■ 50,000 To 99,999
▨ 25,000 To 49,999
░ 10,000 To 24,999
□ Less Than 10,000

Strategy Research Corporation

Although Hispanics live in every state in the United States, they tend to settle in certain states and metropolitan areas.

Two states alone (California and Texas) account for over one-half (54.1%) of the total U.S. Hispanic population. With the addition of seven other states (New York, Florida, Illinois, New Jersey, Arizona, New Mexico, and Colorado), the percent increases to 86.8% (16.4 million Hispanics).

State	1987 Hispanic Population (000)	Total (000)	Percent Of Total U.S. Hispanic Population
California	6,041.3		
Texas	4,164.0		
		10,205.3	54.1%
New York	1,979.1		
		12,184.4	64.5%
Florida	1,254.0		
		13,438.4	71.2%
Illinois	753.5		
		14,191.9	75.2%
New Jersey	625.8		
		14,817.7	78.5%
Arizona	592.1		
		15,409.8	81.6%
New Mexico	586.7		
		15,996.5	84.7%
Colorado	384.4		
		16,380.9	86.8%

Source: Strategy Research Corporation

Concentration of Hispanics is highest in the State of California, where approximately 32% of all U.S. Hispanics live (6.0 million Hispanic population).

The second highest concentration of Hispanics is in Texas (22% of the U.S. Hispanic population), followed by New York (10% of the total U.S. Hispanic population).

Florida is the fourth most populated state, with an estimated 1.3 million Hispanics, or 6.6% of the U.S. total.

U.S. HISPANIC POPULATION
BY GEOGRAPHIC REGION/STATE
1980, 1985, 1987

Region/State	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Northeast	**2,608.2**	**2,841.0**	**3,145.5**
Connecticut	125.2	136.9	149.6
Maine	5.3	5.3	5.0
Massachusetts	141.4	152.8	167.6
New Hampshire	5.2	5.8	6.2
New Jersey	494.1	605.9	625.8
New York	1,661.0	1,744.1	1,979.1
Pennsylvania	153.6	166.8	186.0
Rhode Island	19.0	19.8	22.6
Vermont	3.4	3.6	3.6
Southeast	**1,411.0**	**1,682.9**	**1,887.6**
Alabama	34.0	33.4	36.2
Delaware	9.5	10.5	12.0
District of Columbia	17.8	17.6	18.8
Florida	858.1	1,081.9	1,254.0
Georgia	61.0	68.5	70.2
Kentucky	27.0	31.6	31.3
Louisiana	99.7	105.4	106.5
Maryland	63.2	70.3	75.8
Mississippi	24.2	28.1	27.3
North Carolina	56.0	59.7	66.9
South Carolina	33.7	35.1	40.1
Tennessee	34.0	40.4	40.7
Virginia	79.7	87.8	94.7
West Virginia	13.1	12.6	13.1
Central	**1,344.8**	**1,434.8**	**1,544.9**
Arkansas	17.0	17.6	19.8
Illinois	634.6	681.4	753.5
Indiana	86.5	89.6	96.1

Continued. . .

U.S. HISPANIC POPULATION
BY GEOGRAPHIC REGION/STATE
1980, 1985, 1987
(Continued)

Region/State	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Central (Cont'd)			
Iowa	26.3	28.1	27.2
Kansas	62.6	68.5	73.0
Michigan	157.6	173.9	183.9
Minnesota	32.1	33.4	33.0
Missouri	51.9	54.4	56.1
Nebraska	28.3	31.6	32.1
North Dakota	3.5	4.3	4.3
Ohio	120.0	119.4	125.8
Oklahoma	57.8	66.7	66.8
South Dakota	3.8	4.4	4.6
Wisconsin	62.8	61.5	68.7
Southwest	**3,903.8**	**4,926.4**	**5,342.8**
Arizona	444.1	563.8	592.1
New Mexico	477.1	532.1	586.7
Texas	2,982.6	3,830.5	4,164.0
Northwest	**723.2**	**809.8**	**827.5**
Alaska	9.0	12.3	13.8
Colorado	341.4	374.1	384.4
Idaho	36.6	42.2	41.5
Montana	10.1	12.3	11.0
Nevada	54.1	63.2	68.2
Oregon	66.2	73.8	77.6
Utah	60.0	75.5	70.2
Washington	121.3	126.5	133.6
Wyoming	24.5	29.9	27.2
Pacific	**4,612.7**	**5,867.8**	**6,128.8**
California	4,541.3	5,790.5	6,041.3
Hawaii	71.4	77.3	87.5
TOTAL	**14,603.7**	**17,562.7**	**18,877.1**

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

D. HISPANIC POPULATION GROWTH

From 1950 to 1987, the total population of the United States grew by approximately 98.8 million persons (from 151.3 million in 1950 to 250.1 million in 1987). This represents an increase in total population for the 17 year period of 65.3%. Comparatively, for this same time period, the U.S. Hispanic population increased by 373% (from 4.0 million in 1950 to 18.9 million in 1987).

Since the 1980 Census, the total U.S. population is estimated to have increased by 10.4%, from 226.5 million to 250.1 million persons. In comparison, Hispanic population in the U.S. is anticipated to have increased by 4.3 million, or 29.4%.

TOTAL U.S. POPULATION
VERSUS
U.S. HISPANIC POPULATION
1950 - 1987

	Total U.S. (In Millions)	U.S. Hispanics (In Millions)
1950	151.3	4.0
1960	179.3	6.9
1970	203.2	9.0
1980	226.5	14.6
1985	238.1	17.6
1987	250.1	18.9

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

In the Census period 1970-1980, all geographic regions recorded substantial growth in Hispanic population. The Northeast region, in particular, recorded considerable growth -- 115.5% — primarily in the New York metropolitan area. The Southeast region also recorded substantial growth — 87.1%.

From 1980 to 1987, the overall U.S. Hispanic population grew by 29.3%. The most notable increases occurred in the Southeast, Southwest, and Pacific regions. Specifically, the Southeast increased in Hispanic population by 33.8%, the Southwest by 36.9%, and an increase of 32.9% was registered for the Pacific region.

The Central and Northwest states showed for the lowest percentage increases in the seven year period 1980-1987 (14.9% and 13.0%, respectively).

U.S. HISPANIC POPULATION BY GEOGRAPHIC REGION
1970, 1980, 1987

Region	U.S. Hispanic Population 1970 (000)	U.S Hispanic Population 1980 (000)	U.S. Hispanic Population 1987 (000)	Growth 1970 - 1980 (000)	Growth 1970 - 1980 (Percent)	Growth 1980 - 1987 (000)	Growth 1980 - 1987 (Percent)
Northeast	1,210.5	2,608.2	3,145.5	1,397.7	115.5%	537.3	20.6%
Southeast	754.0	1,411.0	1,887.6	657.0	87.1	476.6	33.8
Central	894.3	1,344.8	1,544.9	450.5	50.3	200.1	14.9
Southwest	2,800.5	3,903.8	5,342.8	1,103.3	39.4	1,439.0	36.9
Northwest	515.9	732.2	827.5	207.3	40.2	95.3	13.0
Pacific	3,115.8	4,612.7	6,128.8	1,496.9	48.0	1,516.1	32.9
TOTAL	9,072.6*	14,603.7	18,877.1	5,531.1	61.0%	4,273.4	29.3%

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

* The 1970 total Hispanic population (9,072.6) is the "Spanish Origin" population as taken from Census Report PC(2)-1C, Persons of Spanish Origin. This population was determined via a closed-ended, self-classification question. Some of the limitations involving this method include:

1. Inconsistent classification of "no answers" - in the Southwest, for example, if the entry was missing, but the person had a Spanish surname, Mexican origin was assumed.
2. Misunderstanding - some respondents interpreted the category "Central or South American" to mean Central or Southern United States; suggesting substantial overstatement in these areas.
3. Inclusion of Portuguese origin persons - some Brazilian origin residents may have reported Central or South American origin, and therefore, were classified as Spanish origin.

The 1970 Census used three other identifiers of the Spanish population: birthplace, surname (Southwest only) and language spoken.

In an effort to better estimate the 1970 Hispanic figure, Strategy Research Corporation has compiled its own 1970 county-by-county Hispanic population for the entire U.S., utilizing the following sources:

1. For counties in Arizona, California, Colorado, New Mexico and Texas; the Census Report PC(2)-1D, Persons of Spanish Surname was used.
2. For the remaining state/county totals, the County and City Data Book, 1972 was used. In this source, the Spanish identifier was persons of Puerto Rican birth or parentage (for New York, New Jersey and Pennsylvania) and persons of Spanish language (for the remaining 42 states and D.C.).
3. The County and City Data Book does not report Spanish populations for counties with less than 400 Hispanic residents. For these counties, Strategy Research Corporation included its own 1970 Spanish population estimates.

The above table includes the 1970 Hispanic population by region from this Strategy Research Corporation compilation. The Spanish population figure utilizing this source differs somewhat from the 1970 "Spanish Origin" population as recorded by the Census Bureau (9,291.0 versus 9,072.6, respectively).

E. HISPANIC VERSUS TOTAL U.S. POPULATION BY REGION, STATE, AND COUNTY

Hispanics in the Southwest represent the greatest percentage of Hispanics on a geographic basis. Twenty-three percent of the Southwest's total population is of Hispanic origin/descent. A similar pattern holds true for the population in the Pacific region (California, Hawaii). Twenty-one percent of this geographic area's population is comprised of Hispanic persons.

Although the Central region constitutes the largest overall population of the U.S. (66.4 million persons), it represents the smallest percentage of Hispanic population (2.3%).

1987
TOTAL U.S. POPULATION
VERSUS
U.S HISPANIC POPULATION
BY GEOGRAPHIC REGION

Region	Total Population (000)	Hispanic Population (000)	Hispanic Percent Of Total
Northeast	52,783.9	3,145.5	6.0%
Southeast	61,883.0	1,887.6	3.1
Central	66,445.5	1,544.9	2.3
Southwest	23,380.7	5,342.8	22.9
Northwest	16,301.5	827.5	5.1
Pacific	29,309.5	6,128.8	20.9
TOTAL	250,104.1	18,877.1	7.5%

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The greatest number of Hispanics (6,041,263) reside in the State of California, the nation's most populous state overall (28,220,300 persons). With a total population of 18,417,000, and a Hispanic population of 4,163,974, Texas is the second most populated state numerically. Hispanics, as a percent of total population, constitute 21.4% and 22.6%, respectively, of California and Texas' total population base.

New York, the nation's third most populated state overall (18,375,700 persons), also has the third largest concentration of Hispanic population (1,979,115 persons). Hispanics comprise 10.8% of New York State's total population base.

New Mexico's population has the highest proportion of Hispanics (36.7%), and Hispanics comprise 17.6% of Arizona's population and 11.1% of Colorado's. Hispanics account for 10.2% of Florida's total population.

The first table which follows illustrates by number and by percentage the concentration of Hispanic population versus that of the total population in each of the 50 states. The number of Hispanic-headed households in each state is also listed.

1987
TOTAL U.S. POPULATION VERSUS U.S. HISPANIC POPULATION BY STATE

State	Hispanic Population	Hispanic Households	Percent Of Total Population	Total Population (000)
Alabama	36,200	11,574	0.9%	4,109.3
Alaska	13,805	3,755	2.5	561.6
Arizona	592,100	161,000	17.6	3,363.2
Arkansas	19,761	5,838	0.8	2,419.6
California	6,041,263	1,620,211	21.4	28,220.3
Colorado	384,405	112,309	11.1	3,455.2
Connecticut	149,600	42,900	4.4	3,377.7
Delaware	12,000	3,300	1.8	649.4
District Of Columbia	18,800	6,500	2.6	723.1
Florida	1,254,014	410,504	10.2	12,303.5
Georgia	70,224	21,928	1.2	6,079.5
Hawaii	87,506	21,860	8.0	1,089.2
Idaho	41,461	10,065	4.0	1,044.0
Illinois	753,531	209,921	6.3	11,948.8
Indiana	96,108	28,067	1.7	5,560.3
Iowa	27,220	8,042	0.9	2,946.7
Kansas	72,976	20,561	2.9	2,488.4
Kentucky	31,318	9,947	0.8	3,805.7
Louisiana	106,453	34,741	2.3	4,586.2
Maine	5,006	1,421	0.4	1,183.4
Maryland	75,800	22,927	1.7	4,486.6
Massachusetts	167,640	50,148	2.6	6,412.4
Michigan	183,899	51,356	1.9	9,555.9
Minnesota	32,992	9,521	0.8	4,247.8
Mississippi	27,311	8,497	1.0	2,666.9
Missouri	56,062	16,097	1.1	5,117.8
Montana	10,949	3,229	1.3	845.7
Nebraska	32,061	9,132	2.0	1,636.4
Nevada	68,206	22,424	7.1	965.4
New Hampshire	6,200	2,064	0.6	1,081.7

Continued. . .

1987
TOTAL U.S. POPULATION
VERSUS
U.S. HISPANIC POPULATION
BY STATE
(Continued)

State	Hispanic Population	Hispanic Households	Percent Of Total Population	Total Population (000)
New Jersey	625,800	191,500	7.8%	8,074.6
New Mexico	586,700	177,210	36.7	1,600.5
New York	1,979,115	642,120	10.8	18,375.7
North Carolina	66,935	20,628	1.1	6,374.6
North Dakota	4,333	1,031	0.6	707.3
Ohio	125,751	38,873	1.2	10,834.8
Oklahoma	66,779	18,472	2.0	3,413.2
Oregon	77,630	21,050	2.9	2,719.3
Pennsylvania	185,978	54,871	1.5	12,743.0
Rhode Island	22,587	6.969	2.3	972.5
South Carolina	40,144	11,596	1.2	3,395.6
South Dakota	4,588	1,216	0.6	723.9
Tennessee	40,743	13,503	0.8	4,822.2
Texas	4,163,974	1,086,758	22.6	18,417.0
Utah	70,243	18,805	4.0	1,738.0
Vermont	3,643	1,328	0.6	562.9
Virginia	94,689	28,133	1.6	5,875.6
Washington	133,628	37,266	3.0	4,464.7
West Virginia	13,046	4,448	0.7	2,004.8
Wisconsin	68,695	19,585	1.4	4,844.6
Wyoming	27,175	7,786	5.4	507.6
TOTAL	18,877,047	5,342,987	7.5%	250,104.1

Source: Market Statistics, Inc.
Strategy Research Corporation

PAGES 56 to 159 ARE LEFT BLANK INTENTIONALLY

F. AGE/SEX DISTRIBUTION

In 1987, the median age for the U.S. Hispanic population is 23.6.

Slightly more than one-fourth (25.2%) of all U.S. Hispanics are children under the age of twelve, while teens (12 - 17 years of age) constitute approximately 12.1% of the U.S. Hispanic population.

1987
U.S. HISPANIC MARKET
AGE/SEX DISTRIBUTION

	U.S. Hispanic Population (000)		Percent Distribution	
Males 18 - 34	3,139.9		16.6%	
Males 35 - 49	1,435.1		7.6	
Males 50 - 54	285.8		1.5	
Males 55+	957.1		5.1	
Males 18+		**5,817.9**		**30.8%**
Females 18 - 34	3,021.1		16.0	
Females 35 - 49	1,520.1		8.1	
Females 50 - 54	340.4		1.8	
Females 55+	1,136.0		6.0	
Females 18+		**6,017.6**		**31.9**
Teens (12-17)		**2,283.1**		**12.1**
Children (0-11)		**4,758.4**		**25.2**
TOTAL		**18,877.0**		**100.0%**
MEDIAN AGE		23.6		

Source: Strategy Research Corporation

The youthfulness of the U.S. Hispanic population is due to both the relatively high fertility and heavy immigration of young adults. The relatively large proportion of Hispanic children reflects both the larger than average family size of Hispanics and the fact that a substantial proportion of immigrants are in the prime child-bearing ages.

Adult males (18 years of age and older) constitute 30.8% of the Hispanic population, while adult females constitute 39.9%.

G. HOUSEHOLD SIZE

Although one and two person households have become the norm in the United States, this does not hold true for U.S. Hispanic households which have historically been larger, on the average, than non-Hispanic households.

To illustrate, the 1970 U.S. Census recorded Hispanic average household size at 3.9, while the overall U.S. average was 3.1. During the 1970's the U.S. Hispanic average declined slightly to 3.7, while the nationwide figure (all ethnic/nationality/cultural groups) declined to 2.8.

The following table shows estimated 1987 household size characteristics for the nation as a whole, the Hispanic population and the major Hispanic nationalities.

1987
U.S. HISPANIC MARKET
HOUSEHOLD SIZE BY TYPE (NATIONALITY) OF HISPANIC ORIGIN

Household Size	Total U.S. Hispanic	Mexican Origin	Puerto Rican Origin	Cuban Origin	Other Hispanic Origin	Total All U.S. Households
Number of Households (000)	5,343.0	2,861.5	771.4	358.7	1,351.4	92,188.7
1-2 Persons	25.6%	17.9%	27.5%	38.3%	24.0%	53.6%
3 Persons	24.3	19.2	18.7	24.7	22.4	17.1
4 Persons	23.6	24.8	26.8	20.7	25.6	16.0
5 Persons	14.7	16.0	11.5	7.7	12.3	7.7
6 Persons	6.6	12.8	7.8	5.6	8.1	3.5
7+ Persons	5.2	9.3	7.7	3.0	7.6	2.1
Average Number of Persons Per Household	3.5	3.8	3.5	3.1	3.1	2.7

Source: Market Statistics, Inc.
Strategy Research Corporation

Presently, the average number of persons per Hispanic household is 3.5. All of the U.S. Hispanic nationality groups record average household sizes in excess of the overall U.S. average (2.7).

Mexican-Americans register the highest average household size (3.8), while Cuban-Americans and Other Hispanic-Americans have smaller-sized households (average of 3.1 members each).

Puerto Rican-Americans record an average household size of 3.5 persons in 1987.

H. MEDIAN INCOME

Although the 1987 estimate of U.S. Hispanic median income is approximately 30% under that of the overall U.S. figure ($22,900 versus $32,800), U.S. Hispanic families are the most financially secure among the world's Hispanics.

U.S. HISPANIC MARKET
MEDIAN FAMILY INCOME
BY TYPE OF HISPANIC ORIGIN
1978, 1980, 1982, 1985, 1987

	1978	1980	1982	1985	1987
Total United States	$16,786	$19,917	$23,433	$28,400	$32,800
Total U.S. Hispanic Origin	**$11,421**	**$14,712**	**$16,228**	**$19,900**	**22,900**
Mexican	11,742	14,765	16,399	20,200	23,300
Puerto Rican	7,972	10,734	11,148	14,200	15,000
Cuban	N.A.	18,245	18,8832	24,400	27,500
Other Hispanic	13,514	16,230	19,069	23,000	26,500

N.A. = Not Applicable

Source: U.S. Department Of Commerce
Bureau of the Census
Strategy Research Corporation

Hispanic-Americans residing in the Southeast region have the highest level of income ($27,700), while Hispanics residing in the Northeast portion of the United States record the least level of income ($16,600).

1987
U.S. HISPANIC MARKET
MEDIAN FAMILY INCOME
BY MARKET REGION

Market Region	Median Family Income
TOTAL U.S. HISPANIC	**$22,900**
Northeast	16,600
Southeast	27,700
Central	23,700
Southwest	22,400
Northwest	25,300
Pacific	24,500

Source: Strategy Research Corporation

Hispanics living in the Northwest U.S. have the second highest median family income at $25,300.

I. EDUCATION

The most common level of educational attainment achieved by U.S. Hispanic heads of household is the equivalent of a Junior High School education (32.3%). A total of 11.6% have the equivalent of four to five years of High School.

1987
U.S. HISPANIC MARKET
LAST LEVEL OF SCHOOL COMPLETED
BY THE HEAD OF HOUSEHOLD

	Total	North-east	South-east	Central	South-west	California
None	1.5%	1.5%	0.6%	0.0%	1.5%	1.9%
Elementary 1	3.3	2.4	1.9	0.0	2.1	5.5
Elementary 2	2.8	1.1	0.3	1.1	3.0	4.3
Elementary 3	1.4	1.6	0.7	3.2	0.7	1.8
Elementary 4	3.2	3.5	1.8	6.4	1.5	4.4
Elementary 5	15.1	4.3	14.7	8.1	7.8	27.1
Junior High 6-8	32.3	27.0	40.2	33.2	36.5	30.0
High School 1-3	18.8	25.2	13.8	26.3	20.5	13.5
High School 4-5	11.6	23.8	7.6	15.1	12.6	5.5
College 1-3	6.1	7.6	12.3	4.8	7.2	3.5
College 4+	2.3	2.0	5.5	0.6	3.1	1.2
Don't Know	0.7	0.0	0.6	0.6	1.7	0.3
Refused	0.9	0.0	0.0	0.6	1.8	1.0
TOTAL	100.0%	100.0%	100.0%	10.0%	100.0%	100.0%

Source: Strategy Research Corporation

Some High School education or graduation from High School was the highest level of schooling achieved by 49.0% of Hispanic heads of household residing in the Northeast region.

The highest percentage of College training or College graduation was recorded by Hispanic heads of household in the Southeast region (17.8%), and by the fewest Hispanics presently residing in the California region (4.7%). California had the greatest percentage of household heads that ended their schooling at the Junior High level (30.0%).

J. EMPLOYMENT

1. Full-Time Employment

Overall, approximately 82% of U.S. Hispanic households have at least one person employed on a full-time basis.

The average number of persons in Hispanic households throughout the U.S. working full-time is 1.4.

1987
U.S. HISPANIC MARKET
HOUSEHOLD MEMBERS WORKING FULL-TIME
BY MARKET REGION

	Total	Northeast	Southeast	Central	Southwest	California
One	44.5%	30.6%	46.6%	39.6%	54.6%	43.4%
Two	27.4	23.3	20.0	32.8	22.1	34.9
Three	7.3	10.8	6.8	9.7	4.4	7.5
Four Or More	2.5	2.0	0.7	4.2	0.6	4.6
None	16.6	33.3	25.9	13.7	16.9	6.3
Refused	1.7	0.0	0.0	0.0	1.4	3.3
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average Number Of Persons Working Full-Time	1.4	1.2	1.1	1.5	1.2	1.6

Source: Strategy Research Corporation

The level of employment per household is highest in California and in the Central U.S. region (1.6 persons and 1.5 persons, respectively).

The Southeast region has the lowest number of persons per household employed on a full-time basis outside of the home (1.1).

2. Female Full-Time Employment

Approximately 38% of U.S. Hispanic households have a female member present who works outside of the home on a full-time basis.

1987
U.S. HISPANIC MARKET
FEMALES IN HOUSEHOLD WORKING FULL-TIME
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
One	32.4%	20.7%	26.0%	28.9%	31.5%	41.0%
Two	3.8	4.6	2.5	7.2	1.1	5.4
Three	0.7	0.3	0.6	0.0	0.5	1.4
Four Or More	0.6	1.1	0.7	0.6	0.3	0.5
None	60.2	73.3	70.2	63.3	64.4	47.3
Refused	2.3	0.0	0.0	0.0	2.2	4.4
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average Number Of Females Working Full-Time	0.5	0.4	0.4	0.5	0.4	0.6

Source: Strategy Research Corporation

Hispanic-Americans in the California region register the highest level of female employment outside of the home; almost one-half (48.3%) indicate the presence of at least one female who is employed on a full-time basis. In comparison, 26.7% of the Hispanic households in the Northeast region have female members working outside of the home on a full-time basis.

3. Occupation Of Head Of Household

Overall, Hispanics are clustered in blue collar and semi-skilled jobs in fields such as construction and manufacturing that suffer high seasonal or cyclical unemployment.

The majority of the Hispanic heads of household in the U.S. (58.4%) are employed in blue collar jobs as craftsmen, technical operatives, service workers, laborers and farmers.

A total of 15.7% are employed in white collar jobs and 20.5% are students, in the military, housewives, unemployed or retired.

1987
U.S. HISPANIC MARKET
OCCUPATION OF HEAD OF HOUSEHOLD BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
White Collar						
Professional, Manager, Owner Clerical Jobs	15.7%	12.8%	12.8%	3.6%	18.9%	16.6%
Blue Collar						
Craftsman, Technical Operatives, Service Workers Laborers, Farmers	58.4	42.5	56.7	79.3	57.7	64.9
Other						
Retired, Students Military, Housewives Unemployed, Retired	20.5	40.9	29.8	15.9	18.7	10.5

Source: Strategy Research Corporation

Blue collar jobs are held by the majority of U.S. Hispanics in the Southeast (56.7%), Southwest (57.7%), Central (79.3%) and California (64.9%) region. In the Northeast region, 42.5% of U.S. Hispanics heads of household work in blue collar professions.

White collar professions are most prominent in the Southwest region (18.9%), while only 3.6% of Hispanic-Americans in the Central region hold white collar jobs.

IV. LANGUAGE PATTERNS

IV. LANGUAGE PATTERNS

In order to provide meaningful insight into the patterns of language use, Hispanics were asked which language they first learned to speak, how well they speak, write and read both Spanish and English, and the language they speak most often at home, work and on social occasions. They were also asked which of the two languages they are in fact most comfortable with speaking. In order to see if the U.S. Hispanic market is responsive toward the need for language skills, Hispanics were also asked the importance to them of their children having the ability to read and write Spanish and English fluently.

More specifically, U.S. Hispanics were asked the following set of language-oriented questions:

* Which was the first language that you learned to speak?

* Which of the following phrases best describe how well you speak Spanish? Would you say that you speak Spanish. . .

    Very Well
    Well
    Fair
    Poor
    Very Poor
    Can't Speak Spanish

* Which phrase best describes the way in which you speak English? Would you say that you speak English. . .

    Very Well
    Well
    Fair
    Poor
    Very Poor
    Can't Speak English

* Which phrase best describes the way in which you write Spanish? Would you say that you write Spanish. . .

    Very Well
    Well
    Fair
    Poor
    Very Poor
    Can't Write Spanish

* Which phrase best describes the way in which you write English? Would you say that you write English. . .

    Very Well
    Well
    Fair
    Poor
    Very Poor
    Can't Write English

* Which phrase best describes the way in which you read Spanish? Would you say that you read Spanish. . .

  Very Well
  Well
  Fair
  Poor
  Very Poor
  Can't Read Spanish

* Which phrase best describes the way in which you read English? Would you say that you read English. . .

  Very Well
  Well
  Fair
  Poor
  Very Poor
  Can't Read English

* Which language do you speak most frequently at home?

* Which language do you speak most frequently on social occasions?

* Which language do you speak most frequently at work?

* Each person has his/her own habits. There are some who communicate better in one language than in another, depending upon the situation. For example, when you are making arithmetic computations such as addition, subtraction, multiplication or division, or when you are in a romantic situation, in what language are you most comfortable?

* How important is it to you that your children have the ability to read and write Spanish fluently?

* How important is it to you that your children have the ability to read and write English fluently?

1. Language Spoken At Home/Work/Social Functions

In order to establish a better overview as to their actual use of the two languages, Hispanics were asked about the language they spoke on different occasions.

The following table is a summary of the language spoken most frequently by U.S. Hispanics at various times.

1987
LANGUAGE SPOKEN
BY U.S. HISPANICS
AT VARIOUS TIMES

Language Spoken	At Home	At Work	On Social Occasions
Spanish	71.7%	35.8%	54.5%
English	10.4	30.0	18.0
Both	17.9	34.2	27.5
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Spanish is spoken most frequently by Hispanics at home, and least often in the work place.

While Spanish is the primary language spoken, there is much crossing over in various situations.

2. Language Skills

As mentioned, Hispanics were asked to evaluate themselves in terms of how well they speak, read and write both Spanish and English.

Eighty-six percent of U.S. Hispanics have the ability to speak Spanish "Very Well/Well;" 43.0% rated their skill to speak English in this manner.

Forty-percent of U.S. Hispanics are able to write English "Very Well/Well," while 37.1% rated their ability to write English "Fair/Poor/Very Poor;" 23.0% do not know how to write English at all.

1987
SUMMARY OF LANGUAGE SKILLS
BY TOTAL U.S. HISPANICS

	Very Well/ Well	Fair/Poor/ Very Poor	Can't Speak/ Read/Write
Fluency Of Speaking Spanish	85.8%	14.0%	0.2%
Fluency Of Speaking English	43.0	40.2	16.8
Proficiency Of Writing Spanish	77.5	18.1	4.4
Proficiency Of Writing English	39.9	37.1	23.0
Ability Of Reading Spanish	80.7	15.5	3.8
Ability Of Reading English	42.1	36.0	21.9

Source: Strategy Research Corporation

A total of 80.7% of all Hispanic-Americans can read Spanish "Very Well/Well," yet, only half this many (42.1%) rated their ability to read English in this fashion. A total of 21.9% of the U.S. Hispanics cannot read English at all.

A. FIRST LANGUAGE LEARNED TO SPEAK

Hispanics were asked, "What Was The First Language Which You Learned To Speak?"

1. By Market Region

Virtually nine out of every ten U.S. Hispanics first learned to speak Spanish.

1987
U.S. HISPANIC MARKET
FIRST LANGUAGE LEARNED TO SPEAK
BY MARKET REGION

	Total	Northeast	Southeast	Central	Southwest	California
Spanish	93.6%	96.3%	100.0%	96.0%	88.6%	96.1%
English	6.4	3.7	0.0	4.0	11.4	3.9
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Overall, English was the first language spoken by only 6.4% of all respondents interviewed.

2. By Country Of Origin

A total of 98.6% of Cuban-Americans first learned to speak Spanish. A lower percentage of Mexican-Americans (91.7%) stated that Spanish was their first language; 8.3% first learned to speak English.

1987
U.S. HISPANIC MARKET
FIRST LANGUAGE LEARNED TO SPEAK
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Spanish	98.6%	91.7%	95.1%	96.3%
English	1.4	8.3	4.9	3.7
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

A total of 95.1% of the Puerto Rican-Americans first learned to speak Spanish, while 4.9% first spoke English.

3. By Age

By age group, nine out of every ten Hispanics interviewed also indicated that the first language they learned to speak was Spanish, with the 55+ age group registering a slightly higher incidence of learning Spanish first.

1987
U.S. HISPANIC MARKET
FIRST LANGUAGE LEARNED TO SPEAK
BY AGE GROUP

	18-34	35-54	55+
Spanish	92.7%	94.2%	95.2%
English	7.3	5.8	4.8
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Younger Hispanics (18 to 34 years of age) indicate a higher degree of first learning to speak English than older (35+) Hispanics.

B. ABILITY TO SPEAK SPANISH

1. By Market Region

When asked how well they speak Spanish, 85.8% of the total sample stated that they spoke the language "Very Well."

1987
U.S. HISPANIC MARKET
FLUENCY OF SPEAKING SPANISH
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
Very Well/Well	85.8%	76.6%	96.8%	88.9%	79.9%	93.5%
Fair/Poor/ Very Poor	14.0	23.4	3.2	11.1	20.0	5.9
Can't Speak Spanish	0.2	0.0	0.0	0.0	0.1	0.6
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Proficiency in the verbal use of the Spanish language is greatest among Hispanics in the Southeast and California. In the Northeast and Southwest, however, some of the Hispanics feel that their fluency of the Spanish language is not as good as it could be ("Fair/Poor/Very Poor").

2. By Country Of Origin

The largest proportion of U.S. Hispanics who speak Spanish "Very Well/Well" are those of Cuban origin or descent (97.7%).

1987
U.S. HISPANIC MARKET
FLUENCY OF SPEAKING SPANISH
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Very Well/Well	97.7%	87.1%	74.0%	87.9%
Fair/Poor/ Very Poor	2.3	12.7	26.0	11.9
Can't Speak Spanish	0.0	0.2	0.0	0.2
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Hispanic-Americans with the least proficiency of verbalizing themselves in the Spanish language are Puerto Rican-Americans (26.0% stated that their Spanish language skills were "Fair/Poor/Very Poor.")

3. By Age

As age increases, so does the proportion of U.S. Hispanics who speak Spanish "Very Well/Well" (87.6% for those 55 years of age and older).

1987
U.S. HISPANIC MARKET
FLUENCY OF SPEAKING SPANISH
BY AGE GROUP

	18-34	35-54	55+
Very Well/Well	82.6%	90.1%	87.6%
Fair/Poor/Very Poor	16.9	9.9	12.4
Can't Speak Spanish	0.5	0.0	0.0
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Among U.S. Hispanics in the 18 to 34 age group, 16.9% indicated that their ability to speak Spanish could be rated "Fair/Poor/Very Poor."

C. ABILITY TO SPEAK ENGLISH

1. By Market Region

In addition to Spanish, Hispanics were also queried with regard to their proficiency of Speaking the English language.

Overall, Hispanics show a higher level of proficiency in Spanish than English, as only 43.0% of those interviewed stated that they speak English "Very Well" or "Well."

Seventeen percent of all U.S. Hispanics interviewed indicated that they could not speak English at all.

1987
U.S. HISPANIC MARKET
FLUENCY OF SPEAKING ENGLISH
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
Very Well/Well	43.0%	46.3%	29.6%	59.4%	52.5%	34.0%
Fair/Poor/Very Poor	40.2	41.7	34.9	30.0	34.7	46.4
Can't Speak English	16.8	12.0	35.5	10.6	12.8	19.6
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

The highest incidence of not being able to speak English was recorded in the Southeast. Slightly more than one-third of the Hispanics (35.5%) in the Southeast stated that they knew no English. Similarly, slightly more than one-fourth (29.6%) of the Hispanics in this market region indicated that their ability of speaking English could be rated "Very Well/Well."

On the other hand, fluency of the English language is greatest among Hispanics in the Central and Southwest portions of the U.S., where over one-half of the Hispanics rate their fluency of speaking the English language as "Very Well/Well."

2. By Country Of Origin

Hispanics whose country of origin is Puerto Rico have the highest incidence of being able to speak English "Very Well/Well" (59.3%).

Meanwhile, U.S. Hispanics who cite their country of origin as Cuba, register the lowest level of fluency with regard to speaking the English language (31.1%).

1987
U.S. HISPANIC MARKET
FLUENCY OF SPEAKING ENGLISH
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Very Well/Well	31.1%	43.0%	59.3%	34.5%
Fair/Poor/Very Poor	42.9	39.8	33.8	46.1
Can't Speak English	26.0	17.2	6.9	19.4
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Twenty-six percent of the Cuban-Americans stated that they were unable to speak English. Comparatively, only 6.9% of the Puerto Rican-Americans indicated not being able to speak the English language.

3. By Age

The younger the age of the Hispanic, the greater the likelihood of speaking English "Very Well/Well."

1987
U.S. HISPANIC MARKET
FLUENCY OF SPEAKING ENGLISH
BY AGE GROUP

	18-34	35-54	55+
Very Well/Well	47.6%	39.1%	36.9%
Fair/Poor/Very Poor	37.8	46.2	36.5
Can't Speak English	14.6	14.7	26.6
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

A total of 26.6% of the older Hispanics (55 years and older) stated that they were unable to speak English.

D. ABILITY TO WRITE SPANISH

1. By Market Region

Hispanics were also queried with regard to how well they wrote Spanish. Fully, three-fourths of all U.S. Hispanics can write Spanish "Very Well/Well."

The U.S. Hispanics' ability to write Spanish is greatest in the Southeast, where 94.3% said their Spanish writing skills rated "Very Well/Well."

1987
U.S. HISPANIC MARKET
HOW WELL SPANISH IS WRITTEN
BY MARKET REGION

	Total	Northeast	Southeast	Central	Southwest	California
Very Well/Well	77.5%	77.1%	94.3%	71.6%	61.5%	88.7%
Fair/Poor/Very Poor	18.1	19.4	5.7	25.4	29.1	9.7
Can't Write Spanish	4.4	3.5	0.0	3.0	9.4	1.6
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

The region in which Hispanics indicate the least ability to write in Spanish is the Southwest. Specifically, 61.5% stated that they were able to write in the Spanish language "Very Well/Well," while 9.4% indicated that they were unable to write Spanish at all.

2. By Country Of Origin

Hispanics of Cuban origin/descent record the highest incidence of being able to write Spanish "Very Well/Well" (94.5%).

Hispanics whose ancestry is other than Cuban, Mexican, or Puerto Rican also show a high level of proficiency for being able to write Spanish "Very Well/Well" (85.4%).

1987
U.S. HISPANIC MARKET
HOW WELL SPANISH IS WRITTEN
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Very Well/Well	94.5%	75.1%	71.0%	85.4%
Fair/Poor/Very Poor	5.5	19.8	24.0	11.6
Can't Write Spanish	0.0	5.1	5.0	3.0
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Three-fourths of the Hispanics whose country of origin is Mexico or Puerto Rico indicated, however, that they are able to write Spanish "Very Well/Well."

3. By Age

Hispanics in the 35 to 54 age group record the highest tendency to be able to write Spanish "Very Well/Well" (81.9%).

1987
U.S. HISPANIC MARKET
HOW WELL SPANISH IS WRITTEN
BY AGE GROUP

	18-34	35-54	55+
Very Well/Well	76.0%	81.9%	74.3%
Fair/Poor/Very Poor	18.5	15.1	22.1
Can't Write Spanish	5.5	3.0	3.6
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Twenty-two percent of the Hispanics 55 years of age and older rated their ability to write Spanish "Fair/Poor/Very Poor."

A total of 5.5% of the younger Hispanics (18 to 34 years of age) stated that they do not know how to write in Spanish at all.

E. ABILITY TO WRITE ENGLISH

1. By Market Region

Overall, approximately 40% of U.S. Hispanics can write English "Very Well/Well." Thirty-seven percent rate their English language writing skills "Fair/Poor/Very Poor," and 23.0% cannot write in English at all.

1987
U.S. HISPANIC MARKET
HOW WELL ENGLISH IS WRITTEN
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
Very Well/Well	39.9%	42.8%	28.9%	51.7%	51.1%	29.7%
Fair/Poor/Very Poor	37.1	39.9	30.5	24.1	27.4	46.5
Can't Write English	23.0	17.3	40.6	24.2	21.5	23.8
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

The greatest ability to write English was recorded in the Central and Southwest regions, where one-half of the Hispanics cited the capability of writing the language "Very Well/Well."

The incidence of writing English "Very Well/Well" is lowest among Hispanics in the California region (29.7%). Similarly, twenty-nine percent of those in the Southeast stated that their ability was "Very Well/Well." In the latter region, however, 40.6% of the Hispanics indicated that they were unable to write in English at all — the California region recorded a 23.8% level.

2. By Country Of Origin

Hispanics whose country of origin is Puerto Rico have the highest incidence of being able to write English "Very Well/Well" (51.1%).

1987
U.S. HISPANIC MARKET
HOW WELL ENGLISH IS WRITTEN
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Very Well/Well	29.2%	40.3%	51.1%	32.7%
Fair/Poor/Very Poor	38.7	36.1	34.4	42.9
Can't Write English	32.1	23.6	14.5	24.4
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

The lowest level of incidence (29.2%) among Hispanics who are able to write English "Very Well/Well" was registered by those who cited Cuba as their country of origin.

3. By Age

Almost one-half (46.1%) of Hispanics in the 18 to 34 age group are able to write English "Very Well" or "Well."

1987
U.S. HISPANIC MARKET
HOW WELL ENGLISH IS WRITTEN
BY AGE GROUP

	18-34	35-54	55+
Very Well/Well	46.1%	34.6%	31.6%
Fair/Poor/Very Poor	35.5	43.3	31.0
Can't Write English	18.4	22.1	37.4
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

As age increases, so does the inability to write English. A total of 18.4% of the younger Hispanics (those 18 to 34 years of age) cannot write English, nor can 22.1% of those 35 to 54 years of age; more than one-third (37.4%) of the Hispanics 55+ cannot write English.

F. ABILITY TO READ SPANISH

1. By Market Region

When Hispanics were asked how well they read Spanish, 80.7% rendered "Very Well/Well" responses.

The highest incidence of reading proficiency was recorded among Hispanics in the Southeast and California, where over 90% of those surveyed stated that they could read Spanish "Very Well/Well."

1987
U.S. HISPANIC MARKET
HOW WELL SPANISH IS READ
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
Very Well/Well	80.7%	81.6%	96.7%	82.1%	64.5%	90.2%
Fair/Poor/Very Poor	15.5	15.1	3.3	13.1	27.9	8.1
Can't Read Spanish	3.8	3.3	0.0	4.8	7.6	1.7
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

A total of 7.6% of the Hispanics in the Southwest stated that they were unable to read the Spanish language.

2. By Country Of Origin

Hispanics whose country of origin is Cuba have the highest incidence of being able to read Spanish "Very Well/Well" (96.2%). In addition, contrary to the other Hispanic-Americans, all Cuban-Americans are able to read Spanish with some proficiency.

1987
U.S. HISPANIC MARKET
HOW WELL SPANISH IS READ
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Very Well/Well	96.2%	78.4%	78.1%	85.4%
Fair/Poor/Very Poor	3.8	17.0	16.5	13.2
Can't Read Spanish	0.0	4.6	5.4	1.4
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Almost eight out of ten Mexican-Americans and Puerto Rican-Americans cited that their reading comprehension of the Spanish language was "Very Well/Well," while approximately 17% said that it was "Fair/Poor/Very Poor."

3. By Age

A total of 85.5% of Hispanics in the 35 to 54 age group are able to read Spanish "Very Well/Well," compared with 77.6% in the 18 to 34 age group and 81.1% of those 55 years of age and older.

1987
U.S. HISPANIC MARKET
HOW WELL SPANISH IS READ
BY AGE GROUP

	18-34	35-54	55+
Very Well/Well	77.6%	85.5%	81.1%
Fair/Poor/Very Poor	17.7	12.2	15.0
Can't Read Spanish	4.7	2.3	3.9
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Hispanics in the 18 to 34 age group register the highest level of not being able to read Spanish (4.7%).

G. ABILITY TO READ ENGLISH

1. By Market Region

With regard to reading English, 42.1% of U.S. Hispanics read the language "Very Well" or "Well." Thirty-six percent rated themselves as "Fair/Poor/Very Poor" readers, while 21.9% said that they cannot read English at all.

The ability of Hispanics to read English is highest in the Central and Southwest portions of the United States. Fifty-one percent of the Hispanics in the Southwest stated that their English reading comprehension was "Very Well/Well," as did 56.7% of the Hispanics in the Central region.

1987
U.S. HISPANIC MARKET
HOW WELL ENGLISH IS READ
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
Very Well/Well	42.1%	45.3%	31.0%	56.7%	51.1%	33.3%
Fair/Poor/Very Poor	36.0	38.0	30.2	27.2	30.7	41.5
Can't Read English	21.9	16.7	38.8	16.1	18.2	25.2
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Hispanics in the Southeast mentioned most often that they could not read the English language (38.8%). Slightly less than one-third, however, stated that they read "Very Well/Well."

2. By Country Of Origin

Among the various Hispanic-Americans, Puerto Rican-Americans register the highest incidence of being able to fully understand the English written language (56.6%). Mexican-Americans register the second highest level at 42.4%.

1987
U.S. HISPANIC MARKET
HOW WELL ENGLISH IS READ
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Very Well/Well	31.2%	42.4%	56.6%	33.9%
Fair/Poor/Very Poor	38.5	34.8	32.8	41.5
Can't Read English	30.3	22.8	10.6	24.6
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

On the other hand, those of Cuban ancestry record the lowest level of reading comprehension, as 30.3% indicated inability to read English.

3. By Age

The ability to read English registers highest among younger Hispanics. Almost one-half (47.9%) of those 18 to 34 years of age read the language "Very Well" or "Well." Comparatively, 37.3% of Hispanics 35 to 54, and 33.7% of those 55+ read English on an above average level.

1987
U.S. HISPANIC MARKET
HOW WELL ENGLISH IS READ
BY AGE GROUP

	18-34	35-54	55+
Very Well/Well	47.9%	37.3%	33.7%
Fair/Poor/Very Poor	32.3	44.1	32.5
Can't Read English	19.8	18.6	33.8
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Roughly 20% of U.S. Hispanics under the age of 55 cannot read the written English language, nor can 33.8% of those 55 years of age and older.

H. LANGUAGE SPOKEN AT HOME

All U.S. Hispanics were asked which language they spoke most frequently at home.

1. By Market Region

Overall, seven out of ten U.S. Hispanics speak Spanish most frequently in the home. Ten percent prefer to speak English, and 17.9% prefer to speak both languages interchangeably.

Spanish is the language spoken most frequently in the home by Hispanics residing in the Southeast (96.9%). The Central region is where Spanish is least spoken as the exclusive language in the home (50.3% level of incidence).

1987
U.S. HISPANIC MARKET
LANGUAGE SPOKEN AT HOME
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
Spanish	71.7%	69.3%	96.9%	50.3%	59.9%	80.8%
English	10.4	10.1	1.3	3.5	15.7	7.6
Both	17.9	20.6	1.8	46.2	24.4	11.6
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

English is cited more often (15.7%) by Hispanics in the Southwest region than in other markets as the language spoken most frequently in the home.

2. By Country Of Origin

Spanish is spoken most frequently in the homes of Cuban-Americans (92.8%). Seventy-one percent of the Mexican-Americans also named Spanish as the primary language spoken in their home.

1987
U.S. HISPANIC MARKET
LANGUAGE SPOKEN AT HOME
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Spanish	92.8%	70.6%	56.1%	80.1%
English	1.2	11.2	14.4	7.2
Both	6.0	18.2	29.5	12.7
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

The incidence of speaking only Spanish in the home registers at a 56.1% level among Puerto Rican-Americans, while an 80.1% level was recorded by Other Hispanic-Americans such as those from Central and South America.

The use of the English language in the home is highest among Puerto Rican-Americans, where 14.4% speak the language most frequently. In comparison, only 1.2% of Cuban-Americans speak English exclusively in the home.

3. By Age

Overall, the majority of all adult Hispanics speak Spanish most frequently in their home.

As age increases, so does the use of the Spanish language. A total of 68.9% of U.S. Hispanics 18 to 34 years of age speak Spanish most frequently, compared to 75.1% of Hispanics 35 to 54 years of age and 74.0% of those 55 years of age and older.

1987
U.S. HISPANIC MARKET
LANGUAGE SPOKEN AT HOME
BY AGE GROUP

	18-34	35-54	55+
Spanish	68.9%	75.1%	74.0%
English	12.1	8.6	8.4
Both	19.0	16.3	17.6
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

The sole use of English in the home records its highest level (12.1%) among younger Hispanics (those 18 to 34 years of age).

I. LANGUAGE SPOKEN AT WORK

In addition to being asked which language they speak most frequently in the home, U.S. Hispanics were also asked which language they speak most frequently at work.

1. By Market Region

With regard to the language spoken most frequently in the work environment, the overall proportion of Hispanics who speak only Spanish, those who speak English exclusively, and those who speak both languages interchangeably is about evenly split. A total of 35.8% state that they speak Spanish, compared to 30.0% who say they speak English most frequently. An additional 34.2% indicate that they speak English and Spanish equally at their work place.

1987
U.S. HISPANIC MARKET
LANGUAGE SPOKEN AT WORK*
BY MARKET REGION

	Total	North- east	South- east	Central	South- west	California
Spanish	35.8%	23.0%	57.3%	21.2%	26.7%	46.2%
English	30.0	45.4	17.8	29.9	37.6	18.5
Both	34.2	31.6	24.9	48.9	35.7	35.3
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

* This data excludes Hispanics who do not work.

Source: Strategy Research Corporation

The incidence of speaking only Spanish at work is highest among Hispanics in the Southeast (57.3%), while it is lowest (21.2%) among Hispanics in the Central region.

English prevails as the language spoken most frequently in the work environment by Hispanics residing in the Northeast (45.4%).

2. By County Of Origin

Spanish is spoken most frequently in their place of employment by Hispanics whose country of origin is Cuba (58.3%). It is the language spoken least often at work by those of Puerto Rican ancestry (9.1%).

1987
U.S. HISPANIC MARKET
LANGUAGE SPOKEN AT WORK*
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Spanish	58.3%	35.2%	9.1%	44.2%
English	15.2	29.4	54.1	24.8
Both	26.5	35.4	36.8	31.0
TOTAL	100.0%	100.0%	100.0%	100.0%

* This data excludes Hispanics who do not work.

Source: Strategy Research Corporation

The incidence of speaking English only at work is highest among Hispanics whose country of origin is Puerto Rico (54.1%).

3. By Age

Slightly more than one-third of all Hispanics, in all age groups, speak Spanish most often at the place where they are employed.

1987
U.S. HISPANIC MARKET
LANGUAGE SPOKEN AT WORK*
BY AGE GROUP

	18-34	35-54	55+
Spanish	34.3%	38.3%	35.5%
English	30.3	31.7	24.7
Both	35.4	30.0	39.8
TOTAL	100.0%	100.0%	100.0%

* This data excludes Hispanics who do not work.

Source: Strategy Research Corporation

The exclusive use of English is limited among those 55 years of age and older (24.7%), in comparison to those younger where it approximates 31%.

J. LANGUAGE SPOKEN ON SOCIAL OCCASIONS

In addition to being asked which language they spoke most frequently at home and at work, Hispanics were also asked which language they spoke most frequently on social occasions.

1. By Market Region

At social gatherings or meetings, the majority of U.S. Hispanics (54.5%) speak Spanish most frequently. Eighteen percent speak only English, while 27.5% speak both Spanish and English.

When they attend social functions, Hispanics in the Southeast speak Spanish most frequently (73.0%); the use of both languages is recorded by 18.4%.

Sixty-five percent of the Hispanics in the California region tend to speak only Spanish in social situations, and 16.2% speak only English.

1987
U.S. HISPANIC MARKET
LANGUAGE SPOKEN ON SOCIAL OCCASIONS
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
Spanish	54.5%	49.6%	73.0%	32.6%	44.3%	65.1%
English	18.0	16.4	8.6	14.3	22.6	16.2
Both	27.5	34.0	18.4	53.1	33.1	18.7
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

The use of English only is highest in the Southwest, where 22.6% of the region's Hispanics speak English on social occasions.

2. By Country Of Origin

Spanish is the language spoken most often on social occasions by Hispanics whose country of origin is Cuba (70.9%); Spanish is least spoken, in this regard, by persons of Puerto Rican ancestry.

1987
U.S. HISPANIC MARKET
LANGUAGE SPOKEN ON SOCIAL OCCASIONS
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Spanish	70.9%	54.0%	36.5%	64.4%
English	7.7	20.2	21.6	12.2
Both	21.4	25.8	41.9	23.4
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Only 7.7% of the Cuban-Americans stated that they converse exclusively in English on social occasions.

3. By Age

As age increases, so does the use of the Spanish language. Specifically, Spanish is the language spoken most frequently at social gatherings or meetings by 48.7% of Hispanics 18 to 34 years of age, while 62.8% of those 55+ conduct the majority of their conversations in Spanish.

1987
U.S. HISPANIC MARKET
LANGUAGE SPOKEN ON SOCIAL OCCASIONS
BY AGE GROUP

	18-34	35-54	55+
Spanish	48.7%	59.1%	62.8%
English	22.9	13.9	11.3
Both	28.4	27.0	25.9
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Furthermore, 22.9% of the Hispanics 18 to 34 years of age stated that they converse in English most frequently on social occasions, compared to 11.3% of Hispanics 55 and older.

K. LANGUAGE MOST COMFORTABLE SPEAKING

Surveyed Hispanics were asked which language they feel most comfortable speaking. That is, they were asked, "Thinking Now About When You Do Arithmetic (That Is, When You Add, Subtract, Divide), or When You Are In A Romantic Situation, Which Language Do You Prefer?"

1. By Market Region

Overall, two-thirds of all U.S. Hispanics (66.5%) are most comfortable speaking Spanish. The use of English, however, is preferred by 15.4%.

Eighty-four percent of the Hispanics in the Southeast feel most comfortable with the Spanish language, while in the Central region, fewer Hispanics feel this way (50.8%).

1987
U.S. HISPANIC MARKET
LANGUAGE MOST COMFORTABLE SPEAKING
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
Spanish	66.5%	62.8%	84.1%	50.8%	56.2%	75.8%
English	15.4	13.9	3.3	13.2	27.9	7.9
Both	18.1	23.3	12.6	36.0	15.9	16.3
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

In the Southwest, 27.9% of the Hispanics feel most comfortable conversing in the English language, yet only 3.3% of the Hispanics in the Southeast feel most comfortable with English.

2. By Country Of Origin

Hispanics who cited their country of origin as Cuba feel most comfortable using the Spanish language (82.0%), while Hispanics of Puerto Rican origin/descent register a lower level of comfortability with Spanish (56.1%).

1987
U.S. HISPANIC MARKET
LANGUAGE MOST COMFORTABLE SPEAKING BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Spanish	82.0%	65.7%	56.1%	72.0%
English	4.3	17.9	19.9	7.8
Both	13.7	16.4	24.0	20.2
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Hispanics whose country of origin is Puerto Rico have the highest incidence of being most comfortable with the English language.

3. By Age

Comfortability with the Spanish language is skewed more toward older Hispanics. That is, while 61.1% of the Hispanics 18 to 34 years of age feel most at ease with Spanish, the feeling is felt by 73.1% of Hispanics 55 years of age and older.

1987
U.S. HISPANIC MARKET
LANGUAGE MOST COMFORTABLE SPEAKING BY AGE GROUP

	18-34	35-54	55+
Spanish	61.1%	71.5%	73.1%
English	19.1	12.9	9.2
Both	19.8	15.6	17.7
TOTAL	100.05	100.0%	100.0%

Source: Strategy Research Corporation

Overall, younger Hispanics (18 to 34) have a greater level of comfort with the English language than do older (35+) Hispanics.

L. ATTITUDES REGARDING LANGUAGE

In order to determine if U.S. Hispanics are responsive toward the need for language skills, they were asked the following two questions:

- "How Important Is It To You That Your Children Have The Ability To Read And Write In Spanish Fluently?"

- "How Important Is It To You That Your Children Have The Ability To Read And Write In English Fluently?"

The possible answers were:

- Very Important
- Somewhat Important
- Neither Important Nor Unimportant
- Not Very Important
- Not At All Important

1. Spanish

a. By Market Region

Overall, more than eight out of ten U.S. Hispanics feel that it is "Very Important" for children to have the proficiency to read and write Spanish. This opinion is most strongly felt among Hispanics in the Southeast (92.2%).

1987
U.S. HISPANIC MARKET
IMPORTANCE OF CHILDREN
HAVING THE ABILITY TO READ/WRITE
SPANISH
BY MARKET REGION

	Total	Northeast	Southeast	Central	Southwest	California
Very Important	85.8%	85.5%	92.2%	80.5%	79.3%	89.9%
Somewhat Important	10.3	11.7	7.0	18.3	13.6	6.9
Neither Important Nor Unimportant	2.8	1.3	0.5	0.6	5.2	2.6
Not Very Important	0.7	0.9	0.0	0.0	1.4	0.3
Not At All Important	0.4	0.6	0.3	0.6	0.5	0.3
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Hispanics in the Southwest and Central regions, on the other hand, place slightly lesser importance on the need for Spanish language skills.

b. By Country Of Origin

Hispanics other than those of Cuban, Mexican, or Puerto Rican descent, feel strongest about children having the ability to read and write Spanish.

1987
U.S. HISPANIC MARKET
IMPORTANCE OF CHILDREN
HAVING THE ABILITY TO READ/WRITE
SPANISH
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Very Important	80.8%	85.1%	87.5%	88.4%
Somewhat Important	18.5	10.1	11.3	7.2
Neither Important Nor Unimportant	0.4	3.4	0.0	3.8
Not Very Important	0.0	0.9	1.2	0.0
Not At All Important	0.3	0.5	0.0	0.6
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Nevertheless, at least eight out of ten U.S. Hispanics feel strongly about children obtaining Spanish language skills.

2. English

a. By Market Region

Overall, as with Spanish, U.S. Hispanics place a great deal of importance on English language skills.

1987
U.S. HISPANIC MARKET
IMPORTANCE OF CHILDREN HAVING THE ABILITY TO READ/WRITE ENGLISH
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
Very Important	93.0%	89.9%	99.2%	85.8%	95.3%	92.2%
Somewhat Important	5.1	8.2	0.5	13.0	4.5	4.1
Neither Important Nor Unimportant	1.4	1.3	0.0	0.6	0.0	2.9
Not Very Important	0.1	0.0	0.0	0.0	0.0	0.4
Not At All Important	0.4	0.6	0.3	0.6	0.2	0.4
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Virtually all Hispanics feel that it is "Very Important" for children to have the ability to read and write the English language.

b. By Country Of Origin

Regardless of country of origin, nine out of ten Hispanic-Americans strongly believe in the need for children to learn English.

1987
U.S. HISPANIC MARKET
IMPORTANCE OF CHILDREN HAVING THE ABILITY TO READ/WRITE ENGLISH
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Very Important	95.5%	93.6%	92.0%	90.4%
Somewhat Important	4.2	4.4	8.0	5.6
Neither Important Nor Unimportant	0.0	1.4	0.0	3.2
Not Very Important	0.0	0.2	0.0	0.0
Not At All Important	0.3	0.4	0.0	0.8
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

V. HOUSEHOLD INCOME AND PERSONAL CONSUMPTION EXPENDITURES

V. HOUSEHOLD INCOME AND PERSONAL CONSUMPTION EXPENDITURES

This section of the Report presents data with regard to the U.S. Hispanic's purchasing power.

A. MEDIAN FAMILY INCOME

In 1987, the median family income for U.S. Hispanics is estimated at $22,900. This compares to $32,800 for the general U.S. population.

Cuban-Americans have the highest median family income of the various Hispanic groups ($27,500).

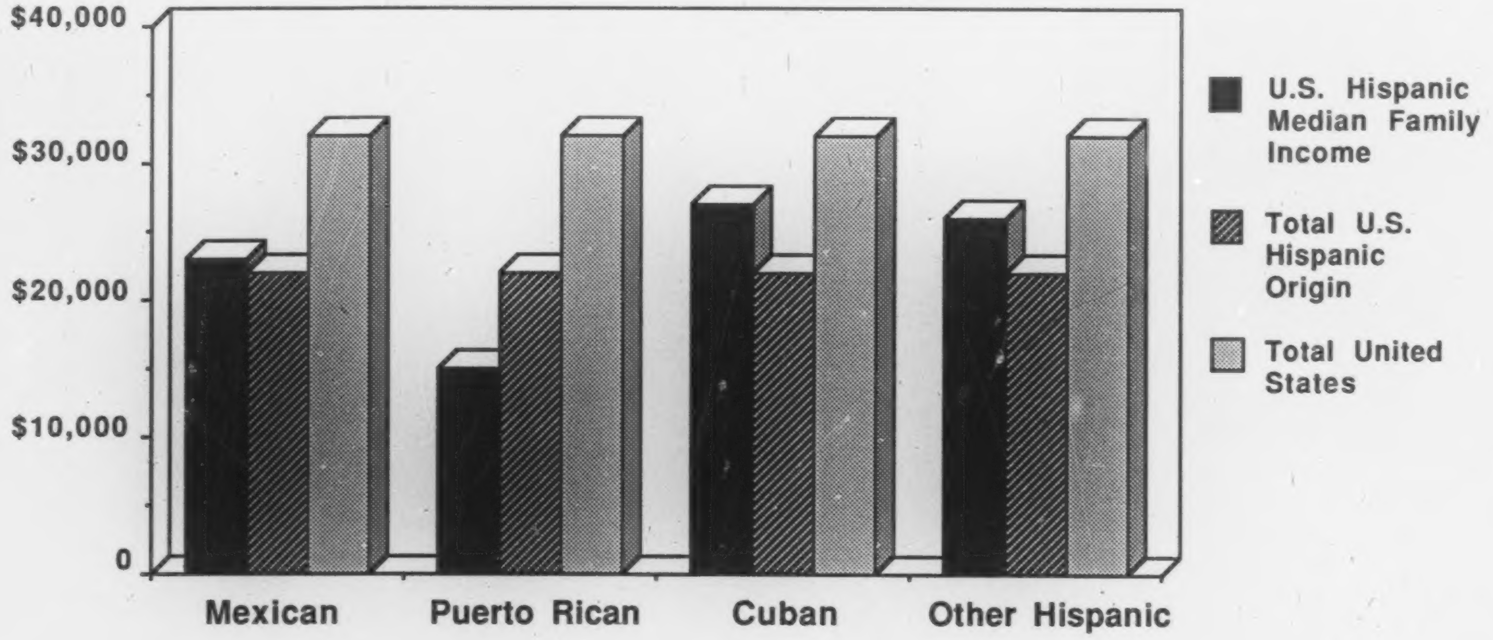
U. S. HISPANIC MARKET
MEDIAN FAMILY INCOME
BY TYPE OF HISPANIC ORIGIN
1978, 1980, 1982, 1985, 1987

	1978	1980	1982	1985	1987
Total United States	$16,786	$19,917	$23,433	$28,400	$32,800
Total U.S. Hispanic Origin	**$11,421**	**$14,712**	**$16,228**	**$19,900**	**22,900**
Mexican	11,742	14,765	16,399	20,200	23,300
Puerto Rican	7,972	10,734	11,148	14,200	15,000
Cuban	N.A.	18,245	18,883	24,400	27,500
Other Hispanic	13,514	16,230	19,069	23,000	26,500

N.A. = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

1987
U.S. Hispanic Market Median Family Income By Type of Hispanic Origin



Source: Strategy Research Corporation

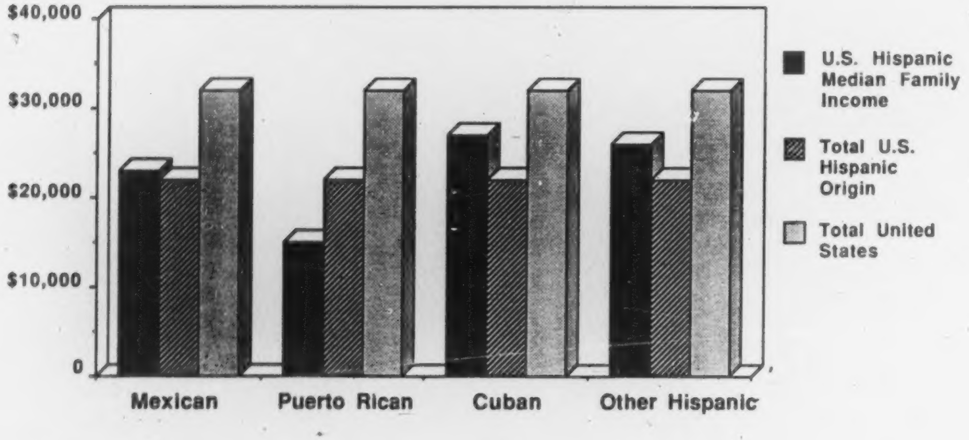
MEDIAN U.S. HISPANIC FAMILY INCOME BY MARKET REGION 1987

Market Region	Median Family Income
Northeast	$16,600
Southeast	27,700
Central	23,700
Southwest	22,400
Northwest	25,300
Pacific	24,500
U.S. HISPANIC MEDIAN	$22,900

Source: Strategy Research Corporation

By region, median family income is highest in the Southeast ($27,700), while income is lowest in the Northeastern states ($16,600). The Southwest region also registers a median family income ($22,400) under the U.S. Hispanic equivalent ($22,900).

1987
U.S. Hispanic Market Median Family Income By Type of Hispanic Origin



Source: Strategy Research Corporation

B. MEAN HOUSEHOLD INCOME/AGGREGATE HOUSEHOLD INCOME

Mean household income is defined as "arithmetic average" household income. It is derived by summing the individual household income values and dividing the total by the number of households. Another way of stating this concept is "income per household." Since mean household income is calculated in this fashion, the values tend to be higher than the corresponding medians (value of the mid-point household's income in an array of households), due to a few households with extremely high incomes.

U.S. Hispanics had a mean household income in 1979 of $16,019 with the 1987 figure revealing an increase of 84% ($29,538).

U. S. HISPANIC MARKET
MEAN HOUSEHOLD INCOME
BY MARKET REGION
1979, 1985, 1987

Market Region	Mean Income 1979	Mean Income 1985	Mean Income 1987
Total U.S. Hispanic	**$16,019**	**$25,837**	**$29,538**
Northeast	$13,891	$22,400	$25,609
Southeast	17,739	28,600	32,699
Central	16,623	26,800	30,631
Southwest	14,959	24,100	27,559
Northwest	14,562	23,500	26,850
Pacific	17,742	28,600	32,699

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The figures confirm that the Southeast and Pacific households have the highest incomes, on the average.

Since mean household incomes are simple arithmetic averages they may be used to develop aggregate household income which is presented in the following table.

U.S. HISPANIC MARKET
AGGREGATE HOUSEHOLD INCOME BY MARKET REGION
1979, 1985, 1987
(MILLIONS OF DOLLARS)

	Aggregate Household Income		
Market Region	1979 (Million $)	1985 (Million $)	1987 (Million $)
Total U.S. Hispanic	**$64,330**	**$123,385**	**$157,810**
Northeast	$10,993	$19,249	$24,618
Southeast	7,760	14,764	18,937
Central	5,985	10,480	13,414
Southwest	15,236	30,707	39,295
Northwest	2,890	5,268	6,628
Pacific	21,466	42,917	54,918

Source: Strategy Research Corporation

The continguous Southwest and Pacific regions together will account for an estimated 60% of U.S. Hispanic household income in 1987.

Aggregate household income, however, provides only an indirect measure of a geographic area's market potential or, "purchasing power." This is because aggregate income includes such components as Federal Income Tax, personal contributions for social insurance and, of course, savings by households out of their income. When these items are deducted, the remainder is "personal consumption expenditures" on goods and services.

C. PERSONAL CONSUMPTION EXPENDITURES

The aggregate income data provided in the previous table, together with parameters developed from data compiled from the U.S. Bureau of Economic Analysis, were used to produce the following table which shows the major components of personal consumption expenditures (purchasing power) for U.S. Hispanics by region.

U.S. HISPANIC MARKET
ESTIMATED PERSONAL CONSUMPTION EXPENDITURES
BY MARKET REGION
1987
(BILLION $)

	Total	Durable Goods	Non-Durable Goods	Services
Total U.S. Hispanic	**$134.1**	**$18.8**	**$46.9**	**$68.4**
Northeast	20.9	2.9	7.3	10.7
Southeast	16.1	2.3	5.6	8.2
Central	11.4	1.6	4.0	5.8
Southwest	33.4	4.7	11.7	17.0
Northwest	5.6	0.8	2.0	2.9
Pacific	46.7	6.5	16.3	23.8

Source: Strategy Research Corporation

Of the estimated $134.1 billion dollars available, approximately 14% will be applied by U.S. Hispanics toward the purchase of durable goods, 35% toward non-durable goods, and an estimated 51% will go toward the purchase of service-related goods and services.

The two Pacific region states of California and Hawaii record the highest estimated personal consumption expenditures of all the regions.

VI. MARKET BY MARKET

VI. MARKET BY MARKET

This section of the Report presents the 33 largest Hispanic markets in the United States, drawing attention to their demographic similarities and differences. As the top 33 Hispanic markets (ADI's)* constitute 86% of the total U.S. Hispanic population, the cumulative picture they offer is closely representative of the national U.S. Hispanic market.

At the national level, the U.S. Hispanic market shares a number of demographic characteristics that begin to define U.S. Hispanics as a separate market segment. The national U.S. Hispanic market has larger and younger families than the general population. U.S. Hispanics are more geographically concentrated and more heavily urban than the general population. The disproportionately fast growth experienced by the U.S. Hispanic population, in comparison to the general population, also contributes to a demographic definition of the national U.S. Hispanic population as a distinct market segment.

All these qualities are evident in varying degrees in each of the top 33 U.S. Hispanic ADI's. Regional differences are also evident, notably in the country of origin of the Hispanic populations in each of the cities. Fluctuations exist in the degree of Hispanic concentration within the metro areas, income and spending power, and the percentage of the total ADI population which the Hispanic population represents.

Notwithstanding the existing demographic differences among the top 33 U.S. Hispanic ADI's the U.S. Hispanic population shares far more basic demographic similarities than differences.

More importantly, the U.S. Hispanic population shares certain cultural characteristics that established it as a distinct and identifiable segment of the general population. The Spanish language, more than any other single identifier, culturally describes the U.S. Hispanic population, being perhaps its most definitive and universal characteristic. The origin of the U.S. Hispanic population may vary from Mexican to Puerto Rican, from Cuban to Latin American, but every Hispanic origin group has purposefully insisted on maintaining the Spanish language, particularly in the home.

---

* Areas of Dominant Influence as defined by Arbitron in their Media Audience Estimate Studies includes U.S. counties and excludes non-U.S. areas.

Each Hispanic origin group also has its own unique heritage and history, celebrating different national holidays which are commemorated in their home countries. Nevertheless, U.S. Hispanics share basic cultural values and traditions that have much more to do with being Hispanic than with being from any single Hispanic country. The U.S. Hispanic population embraces a close family orientation, the extended family not being uncommon. As an entity, U.S. Hispanics also adhere to a strong Catholic tradition as one of their most salient cultural characteristics. These shared cultural traits have much greater impact on shaping behavior attitudes and perceptions than the individual history of a specific country of origin.

Whether in terms of demographics or cultural values, the Hispanic populations in the top 33 U.S. Hispanic ADI's are different in degree rather than in kind. The similarities they share far outweigh the differences and it is exactly these similarities and shared qualities that define the national U.S. Hispanic market.

A. TOP 33 HISPANIC ADI's

The U.S. Hispanic population is heavily concentrated in relatively few markets. Over 86% of the U.S. Hispanic population resides within the top 33 Hispanic markets. In fact, the top ten ADI's contain 11,699,700 Hispanics, 62% of the total U.S. Hispanic population. An astounding 32% of all U.S. Hispanics live in the Los Angeles and New York ADI's.

TOP 33 HISPANIC MARKETS 1987

Rank	Market (ADI)	Hispanic Population (000)
1	Los Angeles	3,614.0
2	New York	2,495.6
3	Miami	936.2
4	San Antonio	889.3
5	San Francisco	786.9
6	Chicago	753.7
7	Houston	706.5
8	McAllen/Brownsville	588.3
9	El Paso	477.9
10	Albuquerque	451.3
11	Fresno	410.3
12	Dallas/Ft. Worth	383.7
13	San Diego	381.4
14	Phoenix	349.3
15	Sacramento/Stockton	344.5
16	Corpus Christi	340.9
17	Denver	260.3
18	Philadelphia	231.1
19	Tucson	208.4
20	Austin	170.8
21	Salinas/Monterey	165.1
22	Tampa/St. Petersburg	140.3
23	Boston	134.1
24	Laredo	131.9
25	Odessa/Midland	129.3

Continued. . .

TOP 33 HISPANIC MARKETS
1987
(Continued)

Rank	Market (ADI)	Hispanic Population (000)
26	Lubbock	124.0
27	Washington D.C.	114.4
28	El Centro/Yuma	101.6
29	Bakersfield	100.6
30	Colorado Springs/Pueblo	97.3
31	Santa Barbara/Santa Maria/ San Luis Obispo	94.2
32	Hartford/New Haven	93.4
33	Detroit	86.6
	TOTAL OF TOP 33	16,293.2
	TOTAL U.S. HISPANIC	18,877.1
	TOP 33 AS A PERCENT OF TOTAL U.S. HISPANIC	86.3%

Source: Strategy Research Corporation

MARKET - 1

LOS ANGELES

1. Hispanic Population

The Los Angeles ADI is the number one ranked Hispanic Market in the United States with a projected Hispanic population in 1987 of 3,614,000 persons. Seventy-four percent of these Hispanics (2,668,200) reside in metropolitan Los Angeles (Los Angeles County) making it by far the largest Hispanic populated county of any in the U.S.

Orange County is the second most Hispanic populated county within the Market with 388,600 persons, or 11% of the total. San Bernardino County is the third most populous with an estimated 244,200 Hispanics in 1987.

LOS ANGELES
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Inyo	CA	0.6	1.1	1.4	1.5
Kern East	CA	6.5	3.4	17.0	18.2
Los Angeles	CA	911.0	2,065.7	2,506.2	2,668.2
Orange	CA	105.6	286.3	366.9	388.6
Riverside West	CA	43.9	102.6	111.3	135.8
San Bernardino	CA	79.6	165.3	208.1	244.2
Ventura	CA	55.7	113.2	142.8	157.5
TOTAL		1,202.9	2,737.6	3,353.7	3,614.0

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The overall Market experienced a growth in Hispanic population of 128% in the decade between 1970 and 1980 with each individual county growing substantially over the ten year period.

From 1980 to 1985, the Market increased in Hispanic population by 22.5% (616,100 persons). In the 1985-1987 period, the area experienced a Hispanic growth rate of approximately 7.8% (260,300 persons).

2. Hispanic Population/Households - Total Population

The seven counties which comprise the Los Angeles ADI constitute a total population base of approximately 13,176,100 persons. Roughly over one-fourth (27.4%) of the area's population is Hispanic in nature.

Of the ADI's seven counties, Los Angeles, Orange and San Bernardino are the three most populated overall. Approximately one-third (32.3%) of Los Angeles County's estimated total population of 8,260,700 persons is Hispanic. Hispanics compose 16.9% of Orange County's population and 20.5% of San Bernardino's.

LOS ANGELES
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Inyo	CA	1.5	0.5	7.2%	20.8
Kern East	CA	18.2	4.5	23.4	77.8
Los Angeles	CA	2,668.2	721.1	32.3	8,260.7
Orange	CA	388.6	94.5	16.9	2,299.4
Riverside West	CA	135.8	33.8	20.7	656.0
San Bernardino	CA	244.2	64.3	20.5	1,191.2
Ventura	CA	157.5	37.9	23.5	670.2
TOTAL		3,614.0	956.6	27.4%	13,176.1

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Overall, there are an estimated 3.8 persons per Hispanic household in the Los Angeles ADI; thus 956,600 households are headed by persons of Hispanic origin or descent. Non-Hispanics in this California market average 2.8 persons per household.

3. Age/Sex Of The Population

Adult Hispanic females outnumber the males in this Market by 90,300 with the greatest differences occurring in the older age groups.

Nearly 40% of the Los Angeles Market's Hispanic population is under 18 years of age with 71.0% under the age of 35. Only 4.0% are 65 or older.

LOS ANGELES
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	567.9		15.7%	
Males 35 - 49	281.9		7.8	
Males 50 - 64	148.2		4.1	
Males 65+	53.6		1.5	
Males 18+		**1,051.6**		**29.1%**
Females 18 - 34	577.8		16.0	
Females 35 - 49	300.4		8.3	
Females 50 - 64	173.6		4.8	
Females 65+	90.1		2.5	
Females 18+		**1,141.9**		**31.6**
Teens (12 - 17)		**433.8**		**12.0**
Children (0 - 11)		**986.7**		**27.3**
TOTAL		**3,614.0**		**100.0%**

Source: Strategy Research Corporation

The average age of Hispanic household members in the Los Angeles area is 23.7 years. The average age of the non-Hispanic community in Los Angeles is 35.5 years, which is almost twelve years older than the area's Hispanic population.

4. Country Of Origin

Approximately 70% of Los Angeles Hispanics are of Mexican origin. This percentage level represents a decrease from those previously recorded as new arrivals from El Salvador, Guatemala and Cuba have made this West Coast market their home. Persons from El Salvador comprise approximately 14% of this area's Hispanics, while persons of Guatemalan descent compose the third greatest percentage of Hispanic origin persons (7%). Cubans presently represent slightly less than 5% of the Market's Hispanics.

5. Length Of Residency Of Head Of Household

The average length of residency in the Los Angeles area among Hispanics is ten years, six months. More than six out of ten Hispanic heads of household in Los Angeles came to the area directly from Mexico.

6. Language Spoken At Home

Roughly seven out of every ten Hispanics in the Los Angeles Market speak Spanish in the home, while approximately 10% speak both English and Spanish at home.

7. Employment

Thirty percent of the Hispanic heads of household are employed in white collar professions, 22% are employed in blue collar jobs and 29% are laborers.

8. Telephone Ownership

Thirty-one percent of Hispanic households in the Los Angeles ADI do not have a phone. Additionally, 32% of the Hispanic households of this Market have unlisted phone numbers.

9. Automobile Ownership

With regard to automobile ownership, almost three-fourths of all Hispanics in the Market area own at least one car with substantial preference for domestic cars, as opposed to imports.

10. Restaurant Patronage

a. Fast-Food Restaurant Patronage

In the Los Angeles ADI, approximately nine out of ten Hispanics patronize fast-food hamburger restaurants. In comparison, these type of fast-food places are frequented by about eight out of ten non-Hispanics.

Similarly, in a Hispanic/non-Hispanic comparison, the incidence of eating at, or taking food from fast-food chicken restaurants is higher among the Los Angeles Hispanic community (82% versus 69% for non-Hispanics).

b. Non Fast-Food Restaurant Patronage

Approximately six out of ten Hispanics eat at non fast-food restaurants, with visitation at least once a week by nearly one-fifth.

11. Financial Relationships

Approximately one-third of Los Angeles Hispanics have a savings account and approximately one-fifth have a checking account.

12. Product Usage

Levels of consumption/use among Hispanic households are approximately the same as non-Hispanic households for carbonated soft drinks, bottled water, perfume/cologne and after shave/cologne. On the other hand, the incidence of consumption/use among Hispanic households is significantly higher for such products as American instant coffee and bleach.

MARKET - 2

NEW YORK

1. Hispanic Population

The New York Market is the number two ranked Hispanic Market in the U.S. In 1987, the New York Market will have an estimated Hispanic population of nearly 2,495,600 persons; equivalent to 13% of the total United States Hispanic population.

The Hispanic population of New York is heavily concentrated in the five boroughs of New York City. Two-thirds of all the Hispanics in the Market reside in Bronx, Kings, New York, Queens and Richmond Counties. Together, these New York City counties account for 1,659,600 Hispanics.

With the inclusion of the City's adjacent counties of Nassau, Suffolk, Westchester, Bergen, Hudson, Essex, Passaic, Union and Middlesex, the Hispanic population increases to 2,342,700 persons; 94% of the Market's total Hispanic population.

During the early stages of Hispanic population growth in the New York Market, much of the movement was to the borough of the Bronx. However, in the decade between 1970 and 1980, the New Jersey portion of the Market had also registered a substantial increase in Hispanic population. That is, from 1970 to 1980, the Hispanic population grew by 315,200 persons, or an increase of nearly 300%. Even in the 1980 to 1987 period, Hispanic population growth in the Jersey area shows an increase of 26%.

Considerable growth has been witnessed within Queens County. In 1970 there were only 33,800 Hispanics living within the county compared to 362,700 recorded for 1987. From 1970 to 1980 the Hispanic population of Queens increased 676%, while during this same period, total population in Queens actually declined by 4.8% (1,987,174 versus 1,891,325, respectively). In this same ten year period, while the Hispanic population for all five boroughs increased by 73%, the total city population decreased by 10.4% (from 7,895,563 in 1970 to 7,071,030 in 1980). Meanwhile, in the period 1980 to 1987, the Hispanic population in Queens County has increased by 38%. Overall population for Queens County, however, has increased by only 12%.

In general, Hispanics have spread out from Manhattan, but there has been far less movement to suburban areas in the New York Market than in most other markets with substantial Hispanic populations. Again, the movement has been largely confined to three of the New York City boroughs (the Bronx, Brooklyn and Queens) and to such heavily urban areas of northern New Jersey as Newark, Jersey City and Union.

NEW YORK
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Fairfield	CT	28.5	45.1	52.1	53.9
Bergen	NJ	3.6	28.5	36.6	37.4
Essex	NJ	28.8	76.6	92.6	93.4
Hudson	NJ	32.3	145.2	182.4	184.5
Hunterdon	NJ	0.7	1.0	1.0	1.2
Middlesex	NJ	11.1	34.1	41.8	42.6
Monmouth	NJ	3.7	12.9	16.4	16.8
Morris	NJ	2.7	11.0	13.6	14.0
Ocean	NJ	2.5	8.4	10.7	11.1
Passaic	NJ	19.8	62.1	77.1	77.6
Somerset	NJ	0.8	4.1	5.0	5.1
Sussex	NJ	1.4	1.8	1.9	2.2
Union	NJ	4.9	40.8	52.8	53.5
Warren	NJ	*	1.0	NA	1.2
Bronx	NY	316.4	396.7	423.8	430.8
Dutchess	NY	1.6	5.9	7.3	7.5
Kings	NY	270.6	392.1	435.1	441.7
Nassau	NY	7.1	43.3	55.4	56.5
New York	NY	184.7	335.8	391.3	400.4
Orange	NY	2.9	11.3	13.8	14.0
Putnam	NY	0.5	1.3	1.5	1.5
Queens	NY	33.8	262.4	348.8	362.7
Richmond	NY	4.7	18.9	23.4	24.0
Rockland	NY	3.9	11.8	14.5	14.7
Suffolk	NY	16.9	58.7	72.8	73.6
Sullivan	NY	0.8	2.7	3.3	3.3
Ulster	NY	1.7	4.9	5.7	6.0
Westchester	NY	5.4	45.6	61.2	64.0
Pike	PA	0.1	0.2	0.4	0.4
TOTAL		991.9	2,064.2	2,442.3	2,495.6

NA = Not Applicable

* Designates a Hispanic population of less than 100 persons.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

2. Hispanic Population/Households - Total Population

The New York ADI is home to 19,289,400 persons, who live throughout 29 constituent counties. The two most populated counties in the ADI are Kings County, New York and Queens County, New York (2,219,600 and 2,121,100 residents, respectively). Hispanics in Kings County represent 20% of the county total, while 17% of Queens County is comprised of persons of Hispanic origin or descent.

A total of 802,900 households in the New York Market Area are Hispanic households. Overall, Hispanic households are comprised of 3.1 members.

NEW YORK
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Fairfield	CT	53.9	15.4	6.1%	883.6
Bergen	NJ	37.4	11.8	4.1	912.2
Essex	NJ	93.4	28.2	10.4	898.1
Hudson	NJ	184.5	62.1	31.0	595.2
Hunterdon	NJ	1.2	0.3	1.0	120.0
Middlesex	NJ	42.6	12.2	6.6	645.5
Monmouth	NJ	16.8	4.8	3.0	560.0
Morris	NJ	14.0	3.8	3.2	437.5
Ocean	NJ	11.1	3.2	2.6	426.9
Passaic	NJ	77.6	22.8	16.5	470.3
Somerset	NJ	5.1	1.5	2.2	231.8
Sussex	NJ	2.2	0.7	1.5	146.7
Union	NJ	53.5	16.9	9.8	545.9
Warren	NJ	1.2	0.3	1.3	92.3
Bronx	NY	430.8	141.2	38.7	1,113.2
Dutchess	NY	7.5	1.7	2.5	300.0
Kings	NY	441.7	142.5	19.9	2,219.6
Nassau	NY	56.5	15.4	4.3	1,314.0
New York	NY	400.4	146.1	26.6	1,505.3
Orange	NY	14.0	3.9	4.8	291.7
Putnam	NY	1.5	0.4	1.7	88.2
Queens	NY	362.7	116.6	17.1	2,121.1
Richmond	NY	24.0	6.9	6.0	400.0
Rockland	NY	14.7	3.9	5.0	294.0
Suffolk	NY	73.6	18.4	5.3	1,388.7
Sullivan	NY	3.3	0.8	4.6	71.7
Ulster	NY	6.0	1.6	3.4	176.5
Westchester	NY	64.0	19.4	6.3	1,015.9
Pike	PA	0.4	0.1	1.7	23.5
TOTAL		2,495.6	802.9	13.0%	19,289.4

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

3. Age/Sex Of The Population

In terms of the age distribution of the Hispanic market in the New York ADI, approximately 36% are under 18 years of age, while 70% are under the age of 35.

NEW YORK
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	404.4		16.2%	
Males 35 - 49	192.3		7.7	
Males 50 - 64	107.4		4.3	
Males 65+	32.5		1.3	
Males 18+		**736.6**		**29.5%**
Females 18 - 34	436.7		17.5	
Females 35 - 49	229.4		9.2	
Females 50 - 64	130.2		5.2	
Females 65+	59.8		2.4	
Females 18+		**856.1**		**34.3**
Teens (12 - 17)		**279.7**		**11.2**
Children (0 - 11)		**623.4**		**25.0**
TOTAL		**2,495.6**		**100.0%**

Source: Strategy Research Corporation

Female adults account for 34.3% of the Hispanic population whereas adult males account for 29.5% of the Hispanic population.

4. Country of Origin

Puerto Ricans (the second largest Hispanic ethnic group in the United States) are the dominant type of Hispanics in New York, representing approximately 58% of the population. The second largest Hispanic group in the New York area is Dominicans (26%) and third largest is South and Central Americans (14%).

5. Language Spoken At Home

With regard to language, seven out of ten Hispanics in the New York Market speak Spanish in the home. Furthermore, an additional 2% speak both Spanish and English in the home.

6. Telephone Ownership

In the New York Market 38% of the Hispanic households do not have a telephone.

Additionally, 34% of Hispanic homes have unlisted telephones. Therefore, 28% of the Spanish households in New York have listed telephones.

7. Food Store Patronage

Approximately one-half of the New York ADI Hispanics shop most frequently in American chain supermarkets - one-third patronize a Hispanic supermarket most often.

8. Fast-Food Restaurant Patronage

Three-fourths of New York Hispanics eat at or take food from fast-food hamburger restaurants. Two-thirds also frequent chicken type fast-food restaurants, while fast-food pizza restaurants are popular among three-fourths of the Hispanics. Hispanics in this market frequent hamburger type fast food restaurants on the average of 2.3 times per month, while chicken fast-food restaurants are patronized on the average of 1.8 times per month, and pizza restaurants, on the average of 2.4 times per month.

9. Product Usage

Hispanics in New York are heavy consumers/users of tomato sauce, soft drinks, breakfast cereals, Latin ground coffee, frankfurters, pasta/noodles, liquid cooking and salad oil, crackers, shampoo, hair conditioners and headache remedies, just to name a few product categories.

MARKET - 3

MIAMI

1. Hispanic Population

The Miami Market is the number three ranked Hispanic Market in the United States with a 1987 estimate of 936,200 Hispanic persons situated within the tri-county area. A total of 91.7% of these Hispanics live in Dade County.

Broward County now has a growing Hispanic population estimated at nearly 70,000, and Monroe County, consisting of the Florida Keys, has a Hispanic population of approximately 7,700 persons. Thus, this total South Florida Market has a current Hispanic population base of nearly 936,200 persons.

MIAMI
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Broward	FL	15.5	40.3	50.3	69.6
Dade	FL	299.2	664.5	805.8	858.9
Monroe	FL	7.8	7.2	7.4	7.7
TOTAL		322.5	712.0	863.5	936.2

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

In the two year period 1985-1987, Dade County experienced an increase in Hispanic population of 53,100 persons (a 6.6% increase). Broward County showed a 38.4% increase in Hispanic population (approximately 19,300 persons).

2. Hispanic Population/Households - Total Population

Dade County's current Hispanic population constitutes approximately 43% of the county's total population.

Hispanics currently comprise 11% of Monroe County's total population, while Hispanics comprise roughly 6% of Broward's total population base.

MIAMI
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Broward	FL	69.6	22.6	5.5%	1,265.5
Dade	FL	858.9	286.3	42.7	2,011.5
Monroe	FL	7.7	3.0	11.2	68.8
TOTAL		936.2	311.9	28.0%	3,345.8

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

It is estimated that there are approximately 286,300 households in Dade County headed by persons of Hispanic origin or descent.

By comparing total population growth with Hispanic population growth, the scope of the Miami Hispanic segment is evident. While the tri-county Hispanic population has grown by 8.4% from 1985 to 1987 (863,500 to 936,200), the total population has grown by only 7.6% (from 3,109,300 to 3,345,800).

3. Age/Sex Of The Population

In terms of the age distribution of the Hispanic market in Miami, approximately 28% are under 18 years of age, while 54% are under the age of 35.

MIAMI
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	109.8		11.7%	
Males 35 - 49	90.8		9.7	
Males 50 - 64	64.8		6.9	
Males 65+	34.3		3.7	
Males 18+		**299.7**		**32.0%**
Females 18 - 34	131.0		14.0	
Females 35 - 49	106.1		11.3	
Females 50 - 64	88.1		9.4	
Females 65+	46.9		5.0	
Females 18+		**372.1**		**39.7**
Teens (12 - 17)		**87.8**		**9.4**
Children (0 - 11)		**176.6**		**18.9**
TOTAL		**936.2**		**100.0%**

Source: Strategy Research Corporation

In comparison to other markets with large quantities of Hispanics, the Hispanic population in Miami is relatively older.

4. Country Of Origin

The Hispanic market in Miami is a large market, and continues to grow as a result of natural increase (births over deaths) and new in-migration.

Currently, 80% of Hispanic households in Dade County are headed by persons of Cuban origin. Between 1970 and 1980, the proportion of Cuban households had been declining (from 87% to 80%). This was a result of a rising number of people from Central and South America joining the Cuban community in South Florida. An increase in Cuban households from 1980 to 1983 (84%) was reflective of the arrival of approximately 125,000 Cuban refugees via the Mariel boatlifts in the Spring of 1980.

Even though the proportion of Cuban-headed households rose from 1980 to 1983, the Central American households continue to increase. This is largely due to the increasing attractiveness of South Florida in relation to continuing economic and political unrest in Central America; most notably in Nicaragua and El Salvador.

5. Language Spoken At Home

More than nine out of every ten Hispanics in the Miami Market speak Spanish in the home.

6. Telephone Ownership

Among the major Hispanic markets in the United States, Miami has the highest incidence of households with telephones (91%). Thirty-eight percent of Miami Hispanic homes have unlisted telephone numbers, while 53% of the Hispanic households in the Miami area have listed telephones.

7. Employment Characteristics

Approximately 30% of the Hispanic heads of household in Miami are employed in white collar professions. Approximately one-half are employed in blue collar jobs, and 20% are retired, students or unemployed.

Currently, 1.3 members per Hispanic household in Dade County are employed full-time. Approximately 44% of Hispanic households in Dade County have at least one female member who is employed full-time.

8. Supermarket Patronage

Patronage of American chain supermarkets and convenience stores has declined significantly since 1980. This is a reflection of two influences. First, there has been a tremendous ingress of Hispanics who are both not fluent in English (from Mariel and Central America), and who have not as yet developed American chain store habits; and, Latin supermarket chains have been making great strides in the South Florida Market. However, in the past few years, the Miami Market has witnessed a strong rise in the competitiveness of Hispanic supermarkets. These operations have been aggressively moving into predominantly Hispanic neighborhoods and providing shoppers with specialty items not easily found in American chain stores, along with American chain operation type benefits.

Incidence of shopping in American supermarkets is higher among non-Cubans than among Cuban-Hispanics in Dade County. This may be a reflection of the fact that non-Cubans have a greater preference outside the heavily Hispanic, primarily Cuban, neighborhoods in which Hispanic supermarkets have been concentrating their efforts.

9. Fast-Food Restaurant Patronage

Patronage of fast-food restaurants is popular among Dade's Hispanics, especially when it comes to hamburger, chicken and pizza-type places.

Approximately, 84% of Dade's Hispanics patronize hamburger fast-food restaurants, with 35% visiting them more than once a week.

Patronage of fast-food chicken restaurants is also high. Eighty-two percent of the Hispanics frequent these type of establishments and 16.5% eat at or take food from fast-food chicken restaurants more than once a week.

Approximately, 69% of Hispanic households have patronized a pizza-type fast-food restaurant. The incidence of patronage more than once a week, however, is lower (13%) than that of hamburger or chicken places.

10. Product Usage

Levels of consumption among Hispanic households are approximately the same as non-Hispanic households for canned beans, soft drinks, American instant coffee and beer. On the other hand, the incidence of consumption among Hispanic households is significantly higher for Latin ground coffee, fruit nectars, olive oil, rice and tomato sauce.

On the other hand, the Hispanic-American market had not yet been developed to the extent the non-Hispanic market has for such items as frozen desserts, frozen entrees and frozen vegetables.

MARKET - 4

SAN ANTONIO

1. Hispanic Population

The San Antonio Market is the number four ranked Hispanic Market in the United States. There is a total of 889,300 Hispanics in the Market and these are heavily concentrated in Bexar County. Specifically, 650,000 Hispanics (73.1% of the ADI's total Hispanic population) are located within this one county.

Overall, the number of Hispanics residing in San Antonio increased from 424,000 in 1970 to 638,500 in 1980, a growth of 51%. The Market now boasts a Hispanic population 39% greater than that recorded in 1980.

In the two year period 1985-1987, the San Antonio ADI Hispanic population increased by 13.8% (an addition of 107,500 new residents to the area).

SAN ANTONIO
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Atascosa	TX	8.0	12.0	15.0	17.4
Bandera	TX	0.3	0.9	1.2	1.4
Bexar	TX	306.9	460.9	565.4	650.0
Comal	TX	6.0	8.7	11.0	13.4
De Witt	TX	3.3	4.4	4.9	5.6
Dimmit	TX	6.7	8.8	9.9	11.1
Edwards	TX	0.9	1.0	1.1	1.2
Frio	TX	6.2	9.4	11.2	12.6
Gillespie	TX	0.9	1.4	1.7	NA
Goliad	TX	1.6	1.8	2.2	2.3
Gonzales	TX	3.9	4.9	5.6	6.1
Guadalupe	TX	7.7	11.9	14.7	17.3
Karnes	TX	4.7	5.8	6.5	7.1
Kendall	TX	1.2	1.4	1.7	2.4
Kerr	TX	1.8	3.9	5.0	5.8
Kimble	TX	0.6	0.7	NA	NA
Kinney	TX	1.0	1.3	1.5	1.7
La Salle	TX	3.5	4.1	4.7	5.3
La Vaca	TX	0.9	1.3	1.5	1.6
Live Oak	TX	2.4	3.1	3.7	NA
McMullen	TX	0.3	0.3	0.3	0.3
Maverick	TX	13.8	28.4	37.8	42.2
Medina	TX	8.2	10.0	11.8	13.4
Real	TX	0.4	0.6	0.7	0.7
Uvalde	TX	7.2	12.4	15.3	16.9
Val Verde	TX	13.0	22.6	28.7	32.7
Wilson	TX	4.5	6.1	7.4	8.8
Zavala	TX	8.3	10.4	11.3	12.0
TOTAL		424.2	638.5	781.8	889.3

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The three Texan counties of Bexar, Comal and Guadalupe constitute the metropolitan area. It is within these counties that 76.5% of the ADI's Hispanic population live. Approximately 90% of the Hispanics live within San Antonio city limits, whereas the remainder live in areas outside of the central city.

2. Hispanic Population/Households - Total Population

With nearly 1,842,900 total persons and 889,300 Hispanics, Hispanics currently constitute 48.3% of the total San Antonio ADI population.

Bexar County is the ADI's most heavily populated county overall (1,294,800 persons). Approximately one-half (50.2%) of Bexar is comprised of persons of Hispanic origin/descent.

With the exception of La Vaca County, which has a Hispanic population equivalent to 7.3% of its total population, the remaining 24 constituent counties all host a Hispanic population complementing their total by at least 13% to 92%. For example, Maverick County's population has the highest proportion of Hispanics (91.7%), while Hispanics comprise 88.9% of Zavala's total population and 74.6% of La Salle's.

SAN ANTONIO
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Atascosa	TX	17.4	4.7	49.4%	35.2
Bandera	TX	1.4	0.4	15.9	8.8
Bexar	TX	650.0	179.1	50.2	1,294.8
Comal	TX	13.4	3.5	24.8	54.0
De Witt	TX	5.6	1.5	24.3	23.0
Dimmit	TX	11.1	2.7	78.2	14.2
Edwards	TX	1.2	0.3	52.2	2.3
Frio	TX	12.6	3.2	70.4	17.9
Goliad	TX	2.3	0.7	38.3	6.0
Gonzales	TX	6.1	1.5	30.3	20.1
Guadalupe	TX	17.3	4.6	26.3	65.8
Karnes	TX	7.1	1.9	44.1	16.1
Kendall	TX	2.4	0.6	13.3	18.0
Kerr	TX	5.8	1.5	14.6	39.7
Kinney	TX	1.7	0.5	56.7	3.0
La Salle	TX	5.3	1.4	74.6	7.1
La Vaca	TX	1.6	0.4	7.3	21.9
McMullen	TX	0.3	0.1	37.5	0.8
Maverick	TX	42.2	9.9	91.7	46.0
Medina	TX	13.4	3.5	44.7	30.0
Real	TX	0.7	0.2	23.3	3.0
Uvalde	TX	16.9	4.1	58.5	28.9
Val Verde	TX	32.7	7.8	65.7	49.8
Wilson	TX	8.8	2.4	38.3	23.0
Zavala	TX	12.0	3.1	88.9	13.5
TOTAL		889.3	239.6	48.3%	1,842.9

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The 889,300 Hispanics in the San Antonio Market live in 239,600 households. Relative to its population, the vast majority of Hispanic households (179,100) are located in Bexar County.

3. Age/Sex Of The Population

In terms of the age characteristics of the San Antonio Hispanic Market, 41.4% of the population is under 18 years of age, while a total of 69.0% are under 35 years of age.

SAN ANTONIO
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	118.0		13.3%	
Males 35 - 49	56.9		6.4	
Males 50 - 64	43.3		4.9	
Males 65+	22.6		2.5	
Males 18+		**240.8**		**27.1%**
Females 18 - 34	127.1		14.3	
Females 35 - 49	69.5		7.8	
Females 50 - 64	52.0		5.8	
Females 65+	31.4		3.5	
Females 18+		**280.0**		**31.5**
Teens (12 - 17)		**119.8**		**13.5**
Children (0 - 11)		**248.7**		**28.0**
TOTAL		**889.3**		**100.0%**

Source: Strategy Research Corporation

Approximately 32% of the Hispanics are females 18 years of age and older, compared with 27% adult males.

4. Country Of Origin

San Antonio's Hispanic residents are predominantly of Mexican origin; more than nine out of every ten are of Mexican descent. As the area was originally explored and settled by the Spanish, it has a rich Hispanic culture and heritage; Mexico relinquished rights to Texas in 1846 - only 141 years ago.

5. Length Of Residence Of Head Of Household

San Antonio Hispanics are notably stable, permanent, long-term residents of the area. Some 86% of Hispanic heads of household have lived in the area for more than 25 years.

6. Language Spoken At Home

Roughly 11% of the San Antonio Hispanic population speak both English and Spanish most frequently at home. A significant amount, however, prefer Spanish for communication within the home (74%).

7. Telephone Ownership

Twenty-five percent of the Hispanic households in the San Antonio Market do not have a telephone.

Fifty percent of the Hispanic households have unlisted telephones, while 25% have listed phones.

8. Automobile Ownership

With regard to automobile ownership, three out of every four San Antonio Hispanic households own or lease at least one car.

9. Employment Characteristics

Twelve percent of Hispanic male heads of household are employed in white collar professions, while 56% hold blue collar jobs.

10. Fast-Food Restaurant Patronage

San Antonio Hispanics are frequent consumers at fast-food restaurants. Forty-two percent of Hispanics frequent a fast-food restaurant at least once a week, while an additional 31% eat at fast-food restaurants two or more times a week.

11. Product Usage

Stand out items in terms of relative use by Hispanic households in San Antonio include barbecue sauce, canned tomato sauce and paste, margarine, headache remedies, and pine disinfectants.

San Antonio Hispanic households show considerable lower levels of usage than non-Hispanic households for products as malt liquor and wine coolers. Latin ground coffee is utilized less frequently than American ground coffee in this Market's Hispanic households.

MARKET - 5

SAN FRANCISCO

1. Hispanic Population

With a Hispanic population in 1987 of approximately 786,900 persons, San Francisco is the fifth largest Hispanic Market in the United States.

From 1985 to 1987, the ADI's population has grown by 69,700 Hispanics, a 9.7% increase.

Hispanics in the San Francisco Market are not as geographically concentrated as are Hispanics in other markets. The largest Hispanic population resides in Santa Clara County, where 282,900 Hispanics live, or 36% of the total. Santa Clara is the home county, and Metropolitan Statistical Area, of the City of San Jose.

SAN FRANCISCO
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Alameda	CA	88.9	130.0	149.9	165.5
Contra Costa West	CA	27.6	56.0	60.7	72.1
Lake	CA	0.6	1.9	2.3	3.0
Marin	CA	6.3	9.2	10.6	11.0
Mendocino	CA	1.8	3.7	4.3	5.0
Napa	CA	4.0	8.6	10.5	11.1
San Francisco	CA	55.1	83.4	93.8	103.2
San Mateo	CA	34.2	73.4	87.2	91.2
Santa Clara	CA	129.8	226.6	260.3	282.9
Solano West	CA	5.0	14.4	12.5	14.0
Sonoma	CA	9.5	20.9	25.1	27.9
TOTAL		362.8	628.1	717.2	786.9

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The next highest concentration of Hispanics is located in Alameda County (165,500) representing 21% of the Market's total. The City of Oakland is in Alameda County.

San Francisco and San Mateo Counties record the third and fourth highest levels of Hispanic population at 103,200 and 91,200 persons, respectively.

2. Hispanic Population/Households - Total Population

The total population of the San Francisco ADI is currently 5,949,100 persons. Overall, the Hispanic populous constitutes 13.2% of the ADI's total population.

The vast majority of these Hispanics reside in Santa Clara County. Hispanics represent an estimated 19.2% of the county's total population.

Hispanics constitute 14% of San Mateo County; similarly 14% of San Francisco County is comprised of persons of Hispanic origin.

SAN FRANCISCO
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Alameda	CA	165.5	49.6	12.7%	1,303.1
Contra Costa West	CA	72.1	21.1	9.2	783.7
Lake	CA	3.0	0.8	5.5	54.5
Marin	CA	11.0	3.3	4.6	239.1
Mendocino	CA	5.0	1.3	6.2	80.6
Napa	CA	11.1	3.1	9.5	116.8
San Francisco	CA	103.2	34.5	13.7	753.3
San Mateo	CA	91.2	26.5	14.0	651.4
Santa Clara	CA	282.9	78.6	19.2	1,473.4
Solano West	CA	14.0	3.8	11.1	126.1
Sonoma	CA	27.9	7.6	7.6	367.1
TOTAL		786.9	230.2	13.2%	5,949.1

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Hispanic households in Santa Clara and Alameda Counties make up over 55% of the 230,200 Hispanic households in the San Francisco Market.

3. Age/Sex Of The Population

Like many of the major Hispanic markets, the Hispanic populous of the San Francisco ADI is young. That is, 36.6% are under 18 years of age, while a total of 68.6% are under 35 years of age.

SAN FRANCISCO
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	126.5		16.1%	
Males 35 - 49	63.1		8.0	
Males 50 - 64	37.8		4.8	
Males 65+	13.3		1.7	
Males 18+		**240.7**		**30.6%**
Females 18 - 34	125.1		15.9	
Females 35 - 49	67.5		8.6	
Females 50 - 64	42.0		5.3	
Females 65+	23.4		3.0	
Females 18+		**258.0**		**32.8**
Teens (12 - 17)		**94.4**		**12.0**
Children (0 - 11)		**193.8**		**24.6**
TOTAL		**786.9**		**100.0%**

Source: Strategy Research Corporation

Approximately 31% of the Hispanic population is comprised of adult males, while nearly 33% are female. Approximately one-fourth are children eleven years of age or younger.

4. Country Of Origin

Approximately 50% of the Hispanic population of the San Francisco Market which, as previously mentioned includes the San Jose area, are of Mexican origin. Those from El Salvador make up another 15%, while Nicaraguans represent the third largest group of Hispanics (7%). Guatemalans and Argentines each constitute approximately 4% of the Hispanic population.

5. Length Of Residency

Approximately one-fifth of the Hispanic heads of household have been living in the United States for more than 20 years; 84% were born in this country.

Before they lived in the San Francisco area, 36% of the Hispanics lived in Mexico; 6% came directly from Nicaragua, 7% came from other parts of California, 7% moved from other U.S. areas/cities, and 8% originated from other Central/South American countries. A total of 7% always lived in the San Francisco Bay Area.

6. Language Spoken At Home

Approximately 64% of the Hispanic population of San Francisco report that Spanish is the language spoken most frequently in their home. Another 24% report that they speak both Spanish and English in their home.

7. Telephone Ownership

In the San Francisco Market, 26% of the Hispanic households do not have a phone. Additionally, 46% of Hispanic homes have unlisted telephone numbers.

Twenty-eight percent of San Francisco Hispanic household phone numbers are listed in the telephone directory.

8. Automobile Ownership

Sixty-three percent of Hispanics own a car or truck; the average number per household is 1.0.

9. Credit Card Ownership

Thirty-two percent of San Francisco Hispanic households have gasoline company credit cards; 29% have a Visa Card, 18% a MasterCard, and 15% an American Express Card.

10. Employment

Over one-third (36.3%) of the Hispanic population in this California market hold white collar jobs, while 42.3% work in blue collar jobs.

11. Financial Relationships

In general, Hispanics in the San Francisco ADI have high levels of financial institution relationships. Seventy-five percent of Hispanics have a regular checking account, while 48% have a regular savings account. A total of 4.3% have short term CD's (1 year or less).

12. Shopping Patterns

Ninety-four percent of Hispanics in the San Francisco ADI regularly shop at department stores.

13. Fast-Food Restaurant Patronage

Fully three-fourths of the Hispanics in this northern California ADI eat at or take food from fast-food restaurants. Hamburger restaurants are, by far, the preferred type (67%), followed by pizza (26%), fried chicken (22%), and taco (19%) restaurants.

14. Product Usage

Hispanics in San Francisco display a high level of usage for a wide array of products. In fact, many products are found to index higher for the Hispanic population than the non-Hispanic population. These products include carbonated soft drinks, fruit drinks, fruit juices and/or nectars, snack foods, beer and malt liquor, and hard liquor such as rum and tequila.

MARKET - 6

CHICAGO

1. Hispanic Population

Chicago is the nation's sixth largest Hispanic Market. The total number of Hispanics residing within the Chicago ADI in 1987 equals 753,700, up from a level of 640,200 in 1980. This represents a growth of nearly 18% over the seven year period 1980 - 1987.

The most Hispanic populated county within this nineteen county ADI is Cook County. In 1987, it is estimated that there will be 581,300 persons of Hispanic origin living within this one county; this figure represents more than three-fourths (77%) of the Market's Hispanic population base.

Lake County hosts the second highest concentration of Hispanics with a population of 48,000 (6.4% of the total). Kane County, with a population of 33,700 Hispanics, ranks as the third most Hispanic populated county (4.5% of the total).

CHICAGO
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Cook	IL	285.6	499.3	578.0	581.3
DeKalb	IL	0.8	1.4	1.5	1.5
DuPage	IL	6.9	17.3	22.0	24.2
Grundy	IL	0.2	0.5	0.6	0.7
Iroquois	IL	0.1	0.4	0.4	0.5
Kane	IL	11.6	26.1	31.5	33.7
Kankakee	IL	0.8	1.3	1.4	1.5
Kendall	IL	0.3	1.1	1.3	1.5
Lake	IL	11.1	21.1	25.1	26.5
La Salle	IL	1.5	2.5	2.7	2.9
Livingston	IL	0.2	0.6	0.7	0.8
McHenry	IL	1.5	3.0	3.6	4.0
Will	IL	7.2	13.8	15.9	17.5
Jasper	IN	0.5	0.3	0.3	0.3
Lake	IN	35.5	43.9	47.8	48.0
La Porte	IN	0.6	1.2	1.3	1.3
Newton	IN	0.1	0.1	0.1	0.1
Porter	IN	1.1	2.7	3.2	3.3
Kenosha	IN	2.7	3.6	4.0	4.1
TOTAL		368.3	640.2	741.4	753.7

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The constituent counties of Cook, Kane and Lake constitute approximately 88% of all Hispanics living in the Chicago ADI.

2. Hispanic Population/Households - Total Population

In 1987, Strategy Research Corporation estimates a total Chicago ADI population (Hispanic and non-Hispanic) of 8,959,100 persons. Cook County accounts for 59% of this total. Presently, there are 581,300 Hispanics living in this Illinois county, which represents 11.0% of the total.

CHICAGO
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Cook	IL	581.3	162.8	11.0%	5,284.5
De Kalb	IL	1.5	0.4	2.0	75.0
Du Page	IL	24.2	6.5	2.8	864.3
Grundy	IL	0.7	0.2	1.5	46.7
Iroquois	IL	0.5	0.1	1.5	32.7
Kane	IL	33.7	8.3	10.5	321.0
Kankakee	IL	1.5	0.4	1.2	125.0
Kendall	IL	1.5	0.4	3.0	50.0
Lake	IL	26.5	6.6	5.4	490.7
La Salle	IL	2.9	0.8	2.5	116.0
Livingston	IL	0.8	0.2	1.5	53.3
McHenry	IL	4.0	1.0	2.3	173.9
Will	IL	17.5	4.4	4.8	364.6
Jasper	IN	0.3	0.1	1.0	30.0
Lake	IN	48.0	13.4	9.0	533.3
La Porte	IN	1.3	0.3	1.2	108.3
Newton	IN	0.1	*	0.5	20.0
Porter	IN	3.3	0.9	2.4	137.5
Kenosha	WI	4.1	1.1	3.1	132.3
TOTAL		753.7	207.9	8.4%	8,959.1

* Designates a population or household figure of less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

There are 207,900 households in this ADI headed by persons of Hispanic origin/descent. More than three-fourths (78%) of these households (162,800) are located in Cook County; Lake County accounts for 6.4% of the total.

3. Age/Sex Of The Population

The Chicago Hispanic Market is quite young, 41.2% are under 18 years of age, while 75.1% are under 35 years of age.

CHICAGO
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	128.0		17.0%	
Males 35 - 49	62.4		8.3	
Males 50 - 64	21.3		2.8	
Males 65+	11.3		1.5	
Males 18+		**223.0**		**29.6%**
Females 18 - 34	127.3		16.9	
Females 35 - 49	58.7		7.8	
Females 50 - 64	22.5		3.0	
Females 65+	11.5		1.5	
Females 18+		**220.0**		**29.2**
Teens (12 - 17)		**89.5**		**11.9**
Children (0 -11)		**221.2**		**29.3**
TOTAL		**753.7**		**100.0%**

Source: Strategy Research Corporation

Adult males make up 29.6% of the Hispanic population, while adult females make up 29.2% of the same population.

4. Country Of Origin

The Chicago Hispanic Market is composed of diverse Hispanic-American groups. The Chicago Market includes Mexicans which represent approximately 63% of all Hispanics in the area. Puerto Ricans make up 21% of the population base, while Cubans represent 3% and Other Hispanics (namely Central and South Americans) account for approximately 12% of the total.

5. Language Spoken At Home

Spanish is the language spoken most frequently at home by the majority of Chicago ADI Hispanics (70%), while 26% speak both Spanish and English interchangeably in the home.

6. Telephone Ownership

Twenty-nine percent of the Hispanic households in the Chicago ADI do not have a telephone; 36% of all households have unlisted numbers, while 35% have numbers which appear in the phone directory.

7. Automobile Ownership

Fifty-six percent of Chicago ADI Hispanics own at least one car; the average number of automobiles owned per household is 1.4.

8. Supermarket Patronage

The American chain supermarket is by far the most popular type of food store patronized by Hispanics (76%). In addition to the American chain supermarket, 22% of the Market's Hispanics shop most frequently at a Hispanic-owned supermarket.

9. Fast-Food Restaurant Patronage

Patronage of fast-food restaurants is high among Chicago ADI Hispanics. Overall, Hispanics visit a hamburger fast-food restaurant approximately 2.8 times per month. The incidence of visiting a chicken fast-food restaurant approximates at 1.6 times per month. On average, Chicago ADI Hispanics visit pizza type fast-food restaurants about twice a month.

10. Product Usage

Levels of consumption among Hispanic households are high for the following products: American ground coffee, tea, processed cheese, potato chips, tomato sauce, chocolate milk additives, frozen fruit bars, carbonated soft drinks, frozen fruit juice, canned soup, breakfast cereals, luncheon meats and frankfurters, among various other products.

The incidence of consumption/use among Hispanic households is significantly lower, however, for such products as American instant coffee, yogurt, frozen vegetables, and olive oil.

MARKET - 7

HOUSTON

1. Hispanic Population

The Houston Market is the seventh largest Hispanic Market in the United States. The ADI consists of twenty counties, six of which comprise the Houston Metropolitan Statistical Area.

The 1987 estimate of Hispanics living in the Houston ADI stands at 706,500 persons. A total of 526,900 (75%) of these Hispanics live in Harris County, home county for the City of Houston. In the seven year period from 1980 to 1987, the Hispanic population has nearly doubled (45.8% increase).

From 1985 to 1987, the Hispanic population of the Market increased by 15.6% with an addition of 95,200 Hispanic persons.

HOUSTON HISPANIC POPULATION 1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Austin	TX	0.3	1.0	1.3	1.4
Brazoria	TX	0.3	22.7	30.0	35.3
Calhoun	TX	4.9	6.7	7.5	8.9
Chambers	TX	0.3	0.6	0.8	0.9
Colorado	TX	1.5	2.7	3.1	3.4
Fort Bend	TX	11.8	26.7	37.7	51.9
Galveston	TX	14.3	23.6	27.0	32.2
Grimes	TX	0.7	1.2	1.5	2.0
Harris	TX	134.9	369.1	464.8	526.9
Jackson	TX	1.8	2.5	2.8	3.1
Liberty	TX	0.1	1.1	1.3	1.6
Matagorda	TX	4.3	8.0	10.1	11.3
Montgomery	TX	1.0	4.3	6.0	7.4
Polk	TX	0.2	0.9	1.2	1.5
San Jacinto	TX	0.1	0.1	0.1	0.2
Trinity	TX	0.0	*	0.1	0.1
Walker	TX	1.0	3.0	3.8	4.4
Waller	TX	0.2	1.1	1.4	1.7
Washington	TX	0.2	0.6	0.8	0.9
Wharton	TX	5.6	8.8	10.0	11.4
TOTAL		183.5	484.7	611.3	706.5

* Designates a Hispanic population of less than 100 persons.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Next to Harris, the second most Hispanic populated county in the ADI is Fort Bend, which is home to approximately 51,900 Hispanics. Brazoria County, with a Hispanic population of 35,300, and Galveston County, with a population of 32,200, rank third and fourth, respectively.

2. Hispanic Population/Households - Total Population

Eighty-eight percent of the Market's Hispanic population resides within the six county metro area. Overall, the metro is estimated to have a 1987 total population of approximately 4,029,300 persons, thus making the metropolitan area 15.5% Hispanic.

HOUSTON
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Austin	TX	1.4	0.3	6.2%	22.6
Brazoria	TX	35.3	8.3	14.5	243.4
Calhoun	TX	8.9	2.3	34.5	25.8
Chambers	TX	0.9	0.2	3.3	27.3
Colorado	TX	3.4	0.9	15.6	21.8
Fort Bend	TX	51.9	12.3	21.6	240.3
Galveston	TX	32.2	9.1	12.5	257.6
Grimes	TX	2.0	0.5	9.8	20.4
Harris	TX	526.9	144.0	16.3	3,232.5
Jackson	TX	3.1	0.9	19.3	16.1
Liberty	TX	1.6	0.4	2.4	66.7
Matagorda	TX	11.3	2.9	22.3	50.7
Montgomery	TX	7.4	1.9	3.4	217.6
Polk	TX	1.5	0.4	4.1	36.6
San Jacinto	TX	0.2	0.1	0.9	22.2
Trinity	TX	0.1	*	1.0	10.0
Walker	TX	4.4	0.6	8.3	53.0
Waller	TX	1.7	0.4	5.9	28.8
Washington	TX	0.9	0.2	3.7	24.3
Wharton	TX	11.4	2.9	22.8	50.0
TOTAL		706.5	188.6	15.1%	4,667.7

* Designates a population or household figure of less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

A total of 188,600 households within this Texas ADI are headed by persons of Hispanic origin.

Overall, the average number of persons per Hispanic household is 3.7. The average number of persons per non-Hispanic household is 2.8.

3. Age/Sex Of The Population

In terms of the age and sex profile of the Hispanic population in this Texas market, 40.1% are under the age of 18, while 73.5% of the population is under 35 years of age.

HOUSTON
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	121.5		17.2%	
Males 35 - 49	52.3		7.4	
Males 50 - 64	25.2		3.6	
Males 65+	13.7		1.9	
Males 18+		**212.7**		**30.1%**
Females 18 - 34	114.8		16.2	
Females 35 - 49	55.8		7.9	
Females 50 - 64	26.5		3.8	
Females 65+	13.8		2.0	
Females 18+		**210.9**		**29.8**
Teens (12 - 17)		**93.9**		**13.3**
Children (0 - 11)		**189.0**		**26.8**
TOTAL		**706.5**		**100.0%**

Source: Strategy Research Corporation

Approximately 27% of Houston Hispanics are children under twelve years of age.

4. Country Of Origin

With regard to ethnic background of the Hispanic population, approximately nine out of every ten persons in the Market is of Mexican origin or descent.

With the relative youthfulness of this Market, and with the high level of permanency it exhibits, it is evident that substantial numbers of these residents are citizens by birth, as well as by naturalization.

5. Length Of Residency Of Head Of Household

The Hispanic Market exhibits a high degree of stability. The average length of residency among Hispanics in the Market area is 15 years, with approximately one-third living in the Houston area for more than twenty years. Additionally, about one-fourth of the Hispanics have always lived in Houston, while approximately one out of every three Hispanics previously lived somewhere else in Texas.

6. Language Spoken At Home

Approximately two-thirds of the Houston Hispanic population speaks Spanish, while the remaining one-third speak both English and Spanish interchangeably at home.

7. Employment Characteristics

An average of 1.1 persons per Hispanic household are employed full-time in Houston.

Over one-quarter of Hispanic male heads of household are employed in white collar occupations, while slightly more than one-half are blue collar workers. Nearly half of female heads of Hispanic households are housewives.

8. Home Ownership

As to the housing profile, approximately three-quarters own their place of residence, while 30% rent.

9. Automobile Ownership

Ninety percent own or lease automobiles, and the average number of automobiles per household is 1.5.

10. Fast-Food Restaurant Patronage

Eating at fast-food restaurants is popular among Houston Hispanics. More than nine out of ten Hispanics frequent hamburger type restaurants, while about seven out of ten patronize chicken fast-food establishments.

MARKET - 8

McALLEN/BROWNSVILLE

1. Hispanic Population

This southernmost Texas Market is the nation's eighth largest Hispanic Market with a Hispanic population that exceeds one-half million persons.

The ADI consists of four counties, each with substantial Hispanic populations.

Ninety percent of the Hispanic population in this Market is concentrated in Hidalgo and Cameron Counties, both of which have shown, and the trend is expected to continue, tremendous growth in terms of Hispanic population. Hidalgo County boasts a Hispanic population of 320,000 persons, an increase of 39% over 1980's figure.

Cameron County, with a Hispanic population of 210,400 persons, has shown a growth of 30% from 1980.

McALLEN/BROWNSVILLE
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Cameron	TX	91.2	161.6	197.9	210.4
Hidalgo	TX	127.5	230.2	289.7	320.0
Starr	TX	15.1	26.4	34.0	39.6
Willacy	TX	10.7	14.0	16.2	18.3
TOTAL		244.5	432.2	537.8	588.3

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

On the other side of the Mexican border is the City of Matamoros, with an estimated population of 250,000. There is considerable commercial intercourse between these markets, swelling the overall consumption of consumer goods.

2. Hispanic Population/Households - Total Population

An estimated 694,800 persons live in this Texas ADI. Overall, Hispanics represent 85% of the population base.

McALLEN/BROWNSVILLE
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Cameron	TX	210.4	55.2	81.2%	259.1
Hidalgo	TX	320.0	76.2	85.6	373.8
Starr	TX	39.6	9.8	95.9	41.3
Willacy	TX	18.3	4.3	88.8	20.6
TOTAL		588.3	145.5	84.7%	694.8

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

There are a total of 145,500 households in the McAllen/Brownsville ADI which are headed by persons of Hispanic origin.

3. Age/Sex Of The Population

Typical of other Hispanic markets, the McAllen/Brownsville ADI is "young" in nature. Forty percent of the population is under 18 years of age and 68% is under 35 years of age.

McALLEN/BROWNSVILLE
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	78.3		13.3%	
Males 35 - 49	38.2		6.5	
Males 50 - 64	29.9		5.1	
Males 65+	16.0		2.7	
Males 18+		**162.4**		**27.6%**
Females 18 - 34	85.9		14.6	
Females 35 - 49	47.8		8.1	
Females 50 - 64	38.9		6.6	
Females 65+	20.7		3.5	
Females 18+		**193.3**		**32.9**
Teens (12 - 17)		**76.5**		**13.0**
Children (0 - 11)		**156.1**		**26.5**
TOTAL		**588.3**		**100.0%**

Source: Strategy Research Corporation

In this Market there are 30,900 more adult Hispanic females than males (193,300 versus 162,400, respectively).

4. Country Of Origin

More than nine out of every ten of the Hispanics in the McAllen/Brownsville Market are of Mexican origin. Mexican-Americans outnumber all other individual groups of Hispanics in this Market. This situation can, of course, be logically predicted due to the Market's proximity to the Mexican border.

5. Language Spoken At Home

Eight out of ten Hispanics in the McAllen/Brownsville Market speak Spanish at home, while 15% speak both English and Spanish at home.

6. Automobile Ownership

Approximately eight out of ten Hispanics in McAllen/Brownsville own at least one car.

7. Fast-Food Restaurant Patronage

Approximately three-fourths of the Hispanics in McAllen/Brownsville frequent fast-food hamburger restaurants. Seven out of ten also patronize chicken type fast-food restaurants.

8. Product Usage

In terms of products used by Hispanic households in McAllen/Brownsville, many display high levels of usage for such items as margarine, cooking/salad oil, mayonnaise, breakfast cereals, crackers and paper towels.

Frozen dinners are used to a lesser degree than other frozen consumables such as pizza, vegetables, fruit juice and fruit bars.

MARKET - 9

EL PASO

1. Hispanic Population

The Hispanic population of El Paso is currently 477,900 persons. This figure is more than double that of 1970 (204,400). El Paso County alone has experienced an increase of 240,700 Hispanic persons from 1970 to 1987 - this represents an increase of approximately 149%.

The metropolitan population, which is defined as El Paso County, contains approximately 84% of the Hispanics in the total El Paso ADI.

This market represents another "border market" which lies adjacent to Juarez, Mexico, a large city with a significant population and labor force.

EL PASO
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Doña Ana	NM	30.4	50.2	58.4	63.4
Luna	NM	4.2	6.2	6.7	7.2
Otero	NM	6.7	9.7	2.5	NA
Culberson	TX	NA	NA	NA	2.8
El Paso	TX	161.8	297.0	349.8	402.5
Hudspeth	TX	1.3	1.6	1.8	2.0
TOTAL		204.4	364.7	419.2	477.9

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Doña Ana, the second most populated county within the ADI, has a 1987 Hispanic population of 63,400 (13.3% of the ADI Hispanic population base).

2. Hispanic Population/Households - Total Population

The Hispanic population of the El Paso ADI is 60.8% of the total ADI population.

El Paso County, with a total population of 640,900 persons has a Hispanic population of 402,500 (62.8% of the county total).

EL PASO
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Doña Ana	NM	63.4	18.0	52.8%	120.1
Luna	NM	7.2	2.0	40.0	18.0
Culberson	TX	2.8	0.6	63.6	4.4
El Paso	TX	402.5	100.9	62.8	640.9
Hudspeth	TX	2.0	0.5	62.5	3.2
TOTAL		477.9	122.0	60.8%	786.6

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

There are 122,000 households in the El Paso ADI headed by Hispanic persons. With a population of 477,900, the average Hispanic household contains 3.9 members.

3. Age/Sex Of The Population

Of all Hispanics in El Paso, 44% are under the age of 18, while the entire adult population between the ages of 18 and 49 only comprise 42.1% of all the Hispanics in this Market. El Paso is a relatively young market, for children under twelve make up nearly 30% of the Hispanic population.

EL PASO
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	60.8		12.7%	
Males 35 - 49	32.7		6.8	
Males 50 - 64	18.1		3.8	
Males 65+	9.5		2.0	
Males 18+		**121.1**		**25.3%**
Females 18 - 34	67.5		14.1	
Females 35 - 49	40.6		8.5	
Females 50 - 64	25.4		5.3	
Females 65+	13.3		2.8	
Females 18+		**146.8**		**30.7**
Teens (12 - 17)		**67.0**		**14.0**
Children (0 - 11)		**143.0**		**29.9**
TOTAL		**477.9**		**100.0%**

Source: Strategy Research Corporation

Meanwhile, only 4.8% of the Hispanic population are adults over the age of 64.

In the adult market, the sex distribution is favored by women who comprise 30.7% of the adult population, while men constitute 25.3%.

4. Country Of Origin

By far, the predominant group of Hispanics in the El Paso Market are Mexicans which represent 95% of the Hispanic population. El Paso is, as previously mentioned, a border market with much contact with its neighboring City of Juarez. Therefore it is logically highly Mexican in nature.

5. Length Of Residency Of Head Of Household

The average length of residency in the United States for the El Paso Hispanic head of household is approximately 16 years.

6. Language Spoken At Home

Well over one-half (60%) of the Hispanics in the El Paso Market speak Spanish in the home.

7. Automobile Ownership

Approximately eight out of ten Hispanic households in El Paso own a car, with an average of 1.6 per household.

8. Product Usage

Hispanics in El Paso register high usage for products such as frankfurters, crackers, children's powdered drinks, canned vegetables, headache remedies, and shampoo.

However, items such as tea, olive oil, canned spaghetti, and vitamins display low usage levels among El Paso Hispanic households.

MARKET - 10

ALBUQUERQUE

1. Hispanic Population

The 1987 Strategy Research Corporation estimate of Hispanic population in the Albuquerque ADI stands at 451,300 persons. This makes the Albuquerque ADI the tenth largest Hispanic Market in the United States.

Approximately 192,500 or 43% of the 1987 Hispanic population of this Market resides in Bernalillo County. In 1970, 91,900 Hispanics resided in Bernalillo County, resulting in a percentage gain from 1970 to 1987 of 109%.

ALBUQUERQUE
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Apache North	AZ	1.2	1.4	2.1	2.5
Alamosa	CO	3.0	3.8	NA	4.2
Archuleta	CO	1.0	1.1	1.3	1.5
Conejos	CO	4.2	4.8	5.0	5.2
Costilla	CO	1.8	2.4	2.5	2.9
Dolores	CO	0.0	0.0	NA	NA
La Plata	CO	2.5	3.1	3.4	NA
Mineral	CO	NA	NA	*	*
Montezuma	CO	1.1	1.4	1.5	1.7
Rio Grande	CO	3.1	3.9	4.1	4.2
Saguache	CO	1.4	1.6	NA	NA
Bernalillo	NM	91.9	154.6	183.0	192.5
Catron	NM	NA	NA	0.8	NA
Cibola	NM	NA	NA	14.5	14.6
Colfax	NM	5.5	6.5	6.7	7.2
De Baca	NM	NA	NA	NA	0.9
Grant	NM	10.3	13.5	14.0	15.1
Guadalupe	NM	3.5	3.7	3.9	4.0
Harding	NM	0.6	0.5	0.5	0.5
Lincoln	NM	2.0	2.9	3.3	4.1
Los Alamos	NM	1.6	2.0	2.2	2.4
McKinley	NM	4.3	7.5	8.2	8.8
Mora	NM	3.3	3.6	3.7	4.1
Otero	NM	NA	NA	10.0	11.2
Rio Arriba	NM	16.6	21.8	22.5	23.7
Roosevelt	NM	NA	NA	NA	4.0
Sandoval	NM	5.3	9.6	10.9	12.8
San Juan	NM	NA	NA	11.0	NA
San Miguel	NM	13.6	18.5	18.8	19.9
Santa Fe	NM	27.0	41.8	46.4	51.4
Sierra	NM	1.9	2.1	2.2	2.5

Continued. . .

ALBUQUERQUE
HISPANIC POPULATION
1970, 1980, 1985, 1987
(Continued)

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Socorro	NM	4.5	5.9	6.1	6.8
Taos	NM	12.1	12.5	13.1	15.5
Torrance	NM	2.3	3.1	3.5	4.1
Valencia	NM	16.6	26.9	17.0	23.0
TOTAL		242.2	360.5	422.2	451.3

NA = Not Applicable

* Designates a Hispanic population of less than 100 persons

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Overall, the Albuquerque ADI increased in Hispanic population by approximately 7% since 1985.

2. Hispanic Population/Households - Total Population

The county with the largest population, (Bernalillo 530,300), in which Albuquerque is located, also registers the highest Hispanic population (192,500 persons). Overall, the Hispanic populous accounts for 36% of the county's total population, while the City of Albuquerque is 34% Hispanic.

The City of Santa Fe (in Santa Fe County) also records a population consisting of approximately 55% Hispanic residents.

ALBUQUERQUE
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Apache North	AZ	2.5	0.8	4.1%	61.0
Alamosa	CO	4.2	1.4	31.8	13.2
Archuleta	CO	1.5	0.5	31.3	4.8
Conejos	CO	5.2	1.7	61.2	8.5
Costilla	CO	2.9	0.9	76.3	3.8
Mineral	CO	*	*	5.0	0.8
Montezuma	CO	1.7	0.5	8.1	21.0
Rio Grande	CO	4.2	1.2	36.2	11.6
Bernalillo	NM	192.5	60.9	36.3	530.3
Cibola	NM	14.6	4.5	36.4	40.1
Colfax	NM	7.2	2.3	46.8	15.4
De Baca	NM	0.9	0.3	32.1	2.8
Grant	NM	15.1	4.5	50.7	29.8
Guadalupe	NM	4.0	1.3	81.6	4.9
Harding	NM	0.5	0.2	45.5	1.1
Lincoln	NM	4.1	1.2	26.6	15.4
Los Alamos	NM	2.4	0.8	11.0	21.8
McKinley	NM	8.8	2.6	13.3	66.2
Mora	NM	4.1	1.3	85.4	4.8
Otero	NM	11.2	3.1	21.4	52.3
Rio Arriba	NM	23.7	7.6	73.1	32.4
Roosevelt	NM	4.0	1.1	21.1	19.0
Sandoval	NM	12.8	4.0	27.2	47.1
San Miguel	NM	19.9	6.4	79.9	24.9
Santa Fe	NM	51.4	16.6	54.8	93.8
Sierra	NM	2.5	0.8	25.3	9.9
Socorro	NM	6.8	2.1	44.4	15.3
Taos	NM	15.5	4.8	65.5	23.7
Torrance	NM	4.1	1.3	40.2	10.2
Valencia	NM	23.0	6.9	50.0	46.0
TOTAL		451.3	141.6	36.6%	1,231.9

* Designates a population or household figure of less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Eight New Mexico counties falling within the Albuquerque ADI are more than one-half Hispanic. Counties with high proportions of Hispanics include Santa Fe (54.8%), Rio Arriba (73.1%), Grant 50.7%, San Miguel (79.9%), Valencia (50.0%), Taos (65.5%), Guadalupe (81.6%) and Mora (85.4% Hispanic).

Meanwhile, approximately 47% of Colfax County is comprised of Hispanics, while in Socorro and Harding Counties Hispanics represent 44% and 46%, respectively, of the county totals.

3. Age/Sex Of The Population

In terms of the age profile of the Hispanic population in this Market, 40.6% are under the age of 18.

ALBUQUERQUE
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	62.5		13.8%	
Males 35 - 49	29.6		6.6	
Males 50 - 64	23.2		5.1	
Males 65+	12.0		2.7	
Males 18+		**127.3**		**28.2%**
Females 18 - 34	64.6		14.3	
Females 35 - 49	34.3		7.6	
Females 50 - 64	27.3		6.0	
Females 65+	14.5		3.2	
Females 18+		**140.7**		**31.2**
Teens (12 - 17)		**61.6**		**13.6**
Children (0 - 11)		**121.7**		**27.0**
TOTAL		**451.3**		**100.0%**

Source: Strategy Research Corporation

Meanwhile, nearly 69% of the Hispanics in Albuquerque are under 35 years of age.

4. Country Of Origin

The vast majority of Hispanics in the Albuquerque Market are of Mexican descent.

5. Length Of Residency Of Head Of Household

Hispanics in the Albuquerque ADI register a high degree of permanency. The average length of residency is 21 years; almost seven out of ten Hispanic heads of household have lived in the United States for more than 25 years.

6. Language Spoken At Home

Albuquerque indicates strong tendencies of bilingualism. Approximately one-third of the Hispanics speak Spanish most frequently in the home, about one-third speak English, and similarly, about one-third speak both Spanish and English interchangeably in their home.

7. Product Usage

A wide variety of items display considerable usage by Hispanic households in Albuquerque. These include barbecue sauce, fruit juice, shortening, tuna fish, mayonnaise, headache remedies, bleach and shampoo.

Canned vegetables are preferred over frozen vegetables by Albuquerque Hispanic households.

MARKET - 11

FRESNO

1. Hispanic Population

In 1987, Strategy Research Corporation estimates that the Hispanic population residing in the Fresno Market will total 410,300 persons, an increase of 244,300 persons or 147% since 1970. From 1980, the Market's Hispanic population will have increased by 39% or, 114,900 persons. In fact, the population in the two year period 1985-1987 will have increased by 41,200 Hispanic persons (11% increase).

Fresno County, the largest county in the Fresno ADI, accounts for one-half of the Hispanic population with 204,900 persons. By definition, this figure is consistent with the Fresno Metropolitan Statistical Area population. The Hispanic population has grown 142% since 1970 from 84,800 to 204,900 persons. Of the Hispanics residing in Fresno County, few make the City of Fresno their home; the vast majority live in areas outside of the central city limits.

FRESNO
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Fresno	CA	84.8	150.8	187.4	204.9
Kings	CA	12.8	19.8	24.3	26.9
Madera	CA	8.1	16.9	22.2	25.1
Mariposa	CA	0.7	0.5	0.8	0.8
Merced	CA	18.8	34.1	42.5	49.0
Tulare	CA	40.8	73.3	91.9	103.6
TOTAL		166.0	295.4	369.1	410.3

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Tulare is the second most Hispanic populated county in the Fresno ADI. The 1987 population total is estimated at 103,600 - an increase of 13% since 1985.

2. Hispanic Population/Households - Total Population

With nearly 1,357,400 total persons and 410,300 Hispanics, the latter currently comprise 30.2% of the total Fresno ADI population.

Fresno County is the ADI's most populated county overall (650,500 total persons). Approximately one-third (31.5%) of Fresno County is composed of persons of Hispanic origin or descent.

With the exception of Mariposa, Hispanics in all counties account for nearly 30% of the total population; only 6% of Mariposa's population base is of Hispanic origin.

FRESNO
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Fresno	CA	204.9	54.1	31.5%	650.5
Kings	CA	26.9	6.8	28.5	94.4
Madera	CA	25.1	6.2	28.5	88.1
Mariposa	CA	0.8	0.2	6.1	13.1
Merced	CA	49.0	12.5	26.7	183.5
Tulare	CA	103.6	25.0	31.6	327.8
TOTAL		410.3	104.8	30.2%	1,357.4

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

There are an estimated 104,800 Hispanic households in the ADI; the mean number of persons per Hispanic household is 3.9.

3. Age/Sex Of The Population

Adults over the age of 50 make up only 12.3% of the Hispanic population of this Market.

FRESNO
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	58.4		14.2%	
Males 35 - 49	28.2		6.9	
Males 50 - 64	16.4		4.0	
Males 65+	9.0		2.2	
Males 18+		**112.0**		**27.3%**
Females 18 - 34	59.9		14.6	
Females 35 - 49	30.0		7.3	
Females 50 - 64	16.4		4.0	
Females 65+	8.5		2.1	
Females 18+		**114.8**		**28.0**
Teens (12 - 17)		**60.4**		**14.7**
Children (0 - 11)		**123.1**		**30.0**
TOTAL		**410.3**		**100.0%**

Source: Strategy Research Corporation

Hispanics under the age of 18 comprise 44.7% of the Hispanic population in Fresno. Furthermore, Hispanics under the age of 35 make up over 73% of the Market.

4. Country Of Origin

Virtually 95% of all Hispanics residing in the Fresno ADI are of Mexican origin.

5. Language Spoken At Home

Fresno registers a 50% incidence of Hispanics speaking Spanish at home. Approximately 13% report that they speak both English and Spanish at home.

6. Telephone Ownership

In the Fresno Market, 29% of the Hispanic households do not have a telephone. Forty percent of the households in this Market have unlisted telephones.

The total Hispanic listed telephone households in Fresno make up 31% of the homes in the Area.

7. Automobile Ownership

Almost nine out of ten Hispanic households in Fresno own an automobile, and the average per household is 2.1.

8. Product Usage

Items displaying a substantial level of usage among Fresno Hispanic households include processed cheese, flour, barbecue sauce, potato chips, pine disinfectant, paper towels and shampoo.

Products exhibiting considerably lower levels of usage among Fresno Hispanic households are canned spaghetti, frozen vegetables, malt liquor and children's products such as vitamins, disposable diapers and baby food.

MARKET - 12

DALLAS/FT. WORTH

1. Hispanic Population

Dallas/Ft. Worth is the twelfth largest Hispanic Market in the United States. The 1987 estimate of Hispanics living in the Dallas/Ft. Worth ADI represents an increase of 18% over the 1985 population. Specifically, the number of Hispanics in this Market will have increased from 324,600 in 1985 to 383,700 in 1987.

A total of 215,800 of these Hispanics are located in Dallas County, representing 56% of the total Hispanic ADI.

Tarrant County, adjacent to Dallas County, is the second highest Hispanic populated county in the Market. In 1987, Tarrant is expected to represent approximately 26% of the Market's Hispanic population base (100,000 persons).

DALLAS/FT. WORTH
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Love	OK	*	0.1	0.1	0.1
Anderson	TX	0.4	1.8	2.3	2.7
Bosque	TX	0.3	0.7	0.8	1.0
Collin	TX	3.0	7.2	9.5	12.6
Comanche	TX	0.7	1.3	1.5	1.7
Cooke	TX	0.2	0.6	0.7	0.7
Dallas	TX	61.4	154.6	186.8	215.8
Delta	TX	0.0	*	0.0	*
Denton	TX	1.7	6.4	8.6	10.4
Ellis	TX	3.3	5.8	7.1	8.5
Erath	TX	0.3	0.9	1.0	1.2
Fannin	TX	0.2	0.3	0.4	0.4
Franklin	TX	*	*	NA	NA
Freestone	TX	0.1	0.3	0.4	0.4
Grayson	TX	0.6	1.3	1.5	1.8
Hamilton	TX	0.1	0.2	0.2	0.2
Henderson	TX	0.3	0.6	0.7	1.1
Hill	TX	1.1	1.4	1.6	1.8
Hood	TX	0.0	0.5	0.6	0.8
Hopkins	TX	0.1	0.4	0.5	0.5
Hunt	TX	0.6	1.3	1.5	1.9
Jack	TX	0.0	0.1	0.1	NA
Johnson	TX	0.8	2.8	3.7	4.5
Kaufman	TX	0.8	1.7	2.1	2.6
Lamar	TX	0.1	0.4	0.4	0.5
Limestone	TX	0.2	0.7	0.9	1.0
Navarro	TX	0.6	1.5	1.7	2.0
Palo Pinto	TX	1.1	1.4	1.4	1.8
Parker	TX	0.6	1.4	1.6	2.0
Rains	TX	0.0	0.1	0.1	0.1
Rockwall	TX	0.1	0.5	0.6	0.8
San Saba	TX	NA	NA	NA	1.1

Continued. . .

DALLAS/FT. WORTH HISPANIC POPULATION 1970, 1980, 1985, 1987

(Continued)

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Somervell	TX	0.1	0.3	0.4	0.4
Stephens	TX	0.0	0.6	NA	NA
Tarrant	TX	31.0	67.6	83.0	100.0
Van Zandt	TX	0.3	0.6	0.7	0.8
Wise	TX	0.3	1.3	1.8	2.1
Wood	TX	NA	NA	0.3	0.4
TOTAL		110.4	266.7	324.6	383.7

NA = Not Applicable

* Designates a Hispanic population of less than 100 persons.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

To further illustrate the concentration of Hispanics, the Dallas/Ft. Worth Market, which includes Collin, Dallas, Denton, Ellis, Hood, Johnson, Kaufman, Parker, Rockwall, Tarrant and Wise Counties, contain 360,100 Hispanics, or 93.9% of all Hispanics in the Dallas/Ft. Worth ADI.

2. Hispanic Population/Households - Total Population

The 1987 total population of the Dallas/Ft. Worth ADI stands at 4,772,400 persons. Dallas County, with a population of 1,979,800 represents 41.5% of this total. Tarrant County is the second most populated county with 1,136,400 permanent residents.

Approximately 11% of Dallas County's population is of Hispanic origin/descent, as is 9% of Tarrant County's.

DALLAS/FT. WORTH
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Love	OK	0.1	*	1.3%	8.8
Anderson	TX	2.7	0.4	5.1	52.9
Bosque	TX	1.0	0.2	5.3	18.9
Collin	TX	12.6	3.0	5.4	233.3
Comanche	TX	1.7	0.4	11.0	15.5
Cooke	TX	0.7	0.2	2.1	33.3
Dallas	TX	215.8	57.9	10.9	1,979.8
Delta	TX	*	*	0.4	5.0
Denton	TX	10.4	2.6	4.9	212.2
Ellis	TX	8.5	1.9	10.5	81.0
Erath	TX	1.2	0.3	3.9	30.8
Fannin	TX	0.4	0.1	1.1	36.4
Freestone	TX	0.4	0.1	2.1	19.0
Grayson	TX	1.8	0.5	1.5	120.0
Hamilton	TX	0.2	0.1	2.3	8.7
Henderson	TX	1.1	0.2	1.3	84.6
Hill	TX	1.8	0.4	5.5	32.7
Hood	TX	0.8	0.2	2.8	28.6
Hopkins	TX	0.5	0.2	1.5	33.3
Hunt	TX	1.9	0.5	2.3	82.6
Johnson	TX	4.5	1.1	4.4	102.3
Kaufman	TX	2.6	0.6	4.6	56.5
Lamar	TX	0.5	0.1	0.9	55.5
Limestone	TX	1.0	0.2	3.9	25.6
Navarro	TX	2.0	0.5	4.4	45.5
Palo Pinto	TX	1.8	0.5	5.9	30.5
Parker	TX	2.0	0.5	3.0	66.7
Rains	TX	0.1	*	2.0	5.0
Rockwall	TX	0.8	0.2	3.5	22.9
San Saba	TX	1.1	0.3	15.9	6.9

Continued. . .

DALLAS/FT. WORTH
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Somervell	TX	0.4	0.1	7.0	5.7
Tarrant	TX	100.0	26.5	8.8	1,136.4
Van Zandt	TX	0.8	0.2	1.9	42.1
Wise	TX	2.1	0.4	6.2	33.9
Wood	TX	0.4	0.1	1.2	33.3
TOTAL		383.7	100.5	8.0%	4,786.2

* Designates a population or household figure of less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

There are 100,500 households in this large Texas Market which are headed by Hispanics.

The average Hispanic household in Dallas County is 37% larger than its non-Hispanic counterpart. The mean number of persons per Hispanic household is 3.7 compared with 2.7 members per non-Hispanic home. Tarrant County shows a similar pattern with Spanish homes averaging 3.8 residents, and non-Spanish homes averaging 2.8.

3. Age/Sex Of The Population

Consistent with national trends, the age distribution within this Texas ADI is skewed relatively toward the younger groups. Over 40% of all Hispanics in the Dallas/Ft. Worth ADI are under 18 years of age, with an additional 34% between the ages of 18 and 34. Thus, 74% of the total Hispanic population is under the age of 35.

DALLAS/FT. WORTH
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	65.5		17.1%	
Males 35 - 49	28.1		7.3	
Males 50 - 64	13.1		3.4	
Males 65+	7.1		1.9	
Males 18+		**113.8**		**29.7%**
Females 18 - 34	64.7		16.9	
Females 35 - 49	30.4		7.9	
Females 50 - 64	13.5		3.5	
Females 65+	7.3		1.9	
Females 18+		**115.9**		**30.2**
Teens (12 - 17)		**49.8**		**13.0**
Children (0 -11)		**104.2**		**27.2**
TOTAL		**383.7**		**100.0%**

Source: Strategy Research Corporation

The proportion of adult males 18+ in this Market is similar to that of females 18+ (113,800 versus 115,900, respectively).

4. Country Of Origin

The Dallas/Ft. Worth Hispanic community is principally of Mexican origin or parentage. That is, more than nine out of every ten Hispanics in the Market area is a Mexican.

5. Length Of Residency Of Head Of Household

Dallas/Ft. Worth Hispanic heads of household have resided in this market for an average of 13 years.

6. Automobile Ownership

More than eight out of ten Hispanic households own at least one automobile, and the average number of cars per household is 1.7.

7. Credit Card Ownership

The Dallas/Ft. Worth Hispanic Market exhibits strong signs of credit worthiness. Approximately 40% of the Hispanics possess one or more credit cards. The most popular types are MasterCard/Visa cards and department store cards.

8. Supermarket Patronage

American chain supermarkets are the preferred stores for grocery purchasing, as more than 85% of Hispanics do their grocery shopping at this type of outlet.

9. Fast-Food Restaurant Patronage

The patronage of fast-food restaurants is popular among Dallas/Ft. Worth Hispanics. Approximately eight out of ten frequent hamburger, chicken and/or pizza type restaurants.

10. Product Usage

Dallas/Ft. Worth Hispanic households exhibit high levels of usage for a wide variety of products such as margarine, processed cheese, luncheon meats, gelatin/pudding, salad dressing, cold and stomach remedies, perfume/cologne and hand/body lotion. However, products such as Latin ground coffee and frozen dinners register lower levels of usage among Dallas/Ft. Worth Hispanic households.

MARKET - 13

SAN DIEGO

1. Hispanic Population

The San Diego Market is synonymous with the San Diego Metropolitan Statistical Area which is comprised of San Diego County.

The Market has an estimated Hispanic population of 381,400, approximately one-half of which is located in the central City of San Diego.

SAN DIEGO
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
San Diego	CA	102.5	275.2	340.1	381.4
TOTAL		102.5	275.2	340.1	381.4

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Overall, the Market's Hispanic population is estimated to have increased by 38.6% over the 1980 Census recorded population figure of 275,200 to a 1987 total of 381,400 persons.

2. Hispanic Population/Households - Total Population

The total population of this California ADI is 2,398,700 persons; Hispanics represent 15.9% of this total.

SAN DIEGO
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
San Diego	CA	381.4	98.6	15.9%	2,398.7
TOTAL		381.4	98.6	15.9%	2,398.7

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

There are approximately 98,600 households in the ADI that are headed by persons of Hispanic origin or descent.

3. Age/Sex Of The Population

More than one-third (39.7%) of the San Diego Market is under 18 years of age and 72.6% is under the age of 35.

SAN DIEGO
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)	Percent Distribution
Males 18 - 34	69.8	18.3%
Males 35 - 49	27.6	7.2
Males 50 - 64	13.2	3.5
Males 65+	6.8	1.8
Males 18+	**117.4**	**30.8%**
Females 18 - 34	55.9	14.7
Females 35 - 49	32.0	8.4
Females 50 - 64	15.9	4.2
Females 65+	8.6	2.3
Females 18+	**112.4**	**29.5**
Teens (12 - 17)	**49.3**	**12.9**
Children (0 - 11)	**102.3**	**26.8**
TOTAL	**381.4**	**100.0%**

Source: Strategy Research Corporation

The adult Hispanic market in the San Diego ADI is rather evenly distributed in terms of sex: 30.8% are male, while 29.5% are female.

4. Country Of Origin

With regard to the composition of the Hispanic population, the majority is of Mexican origin. In recent years, many Salvadoreans, however, are making the San Diego area their home.

5. Length Of Residency Of Head Of Household

The length of residency in the United States for Hispanic heads of household in San Diego approximates at 6½ years.

6. Language Spoken At Home

Eight out of ten Hispanics in the San Diego Market speak Spanish while at home.

7. Financial Relationships

Three out of ten Hispanics maintain a savings account; 6% have a checking account.

8. Fast-Food Restaurant Patronage

More than eight out of ten Hispanics in San Diego patronize both chicken and hamburger type fast-food restaurants. However, San Diego Hispanics average 2.9 visits per week to hamburger places, compared to an average of 1.2 visits per week to chicken fast-food restaurants.

9. Product Usage

San Diego Hispanic households display high levels of usage for such products as pasta, mayonnaise, breakfast cereals, ketchup and headache remedies.

Products showing lower levels of usage among San Diego Hispanic households include malt liquor and after shave lotion/cologne.

MARKET - 14

PHOENIX

1. Hispanic Population

In 1987, Hispanic population in the Phoenix Market is projected at 349,300 persons. This represents an increase of 36% over the 1980 total and an increase of 10% over the 1985 total.

A total of 270,200 Hispanics (77%) reside in Maricopa County and 34,400 (10%) reside in Pinal County. Pinal County is the ADI's second most Hispanic populated county and has experienced a growth of 11% in Hispanic population from 1985 to 1987.

PHOENIX
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Apache South	AZ	NA	NA	NA	0.5
Coconino	AZ	NA	NA	8.0	NA
Gila	AZ	5.9	7.7	8.7	9.2
Graham	AZ	NA	NA	NA	6.7
Greenlee	AZ	3.4	5.4	6.1	6.2
La Paz	AZ	NA	NA	NA	3.1
Maricopa	AZ	100.9	199.0	246.5	270.2
Mohave	AZ	0.9	2.3	2.9	3.2
Navajo	AZ	3.2	4.5	5.1	5.4
Pinal	AZ	18.6	26.8	30.9	34.4
Yavapai	AZ	2.8	4.2	4.9	5.8
Riverside East	CA	2.1	4.9	4.5	4.6
San Bernardino East	CA	0.8	1.5	NA	NA
TOTAL		138.6	256.3	317.6	349.3

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The other 44,700 Hispanics (13%) live in the other nine constituent counties which comprise the Phoenix ADI.

2. Hispanic Population/Households - Total Population

The Phoenix ADI has a total population of 2,352,000 persons. Overall, Maricopa County has the highest concentration of residents (1,863,400), followed by Pinal County (114,700). Hispanics in Maricopa constitute 14.5% of the total population base, while 30.0% of the population in Pinal County is of Hispanic origin or descent.

PHOENIX
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Apache South	AZ	0.5	0.1	4.2%	11.9
Gila	AZ	9.2	2.9	21.1	43.6
Graham	AZ	6.7	1.8	26.3	25.5
Greenlee	AZ	6.2	2.0	49.2	12.6
La Paz	AZ	3.1	0.7	21.8	14.2
Maricopa	AZ	270.2	73.0	14.5	1,863.4
Mohave	AZ	3.2	1.0	4.1	78.0
Navajo	AZ	5.4	1.5	6.7	80.6
Pinal	AZ	34.4	9.1	30.0	114.7
Yavapai	AZ	5.8	1.9	6.9	84.1
Riverside East	CA	4.6	1.2	19.7	23.4
TOTAL		349.3	95.2	14.9%	2,352.0

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

There are approximately 95,200 Hispanic households in this ADI; 73,000 (77%) are located in Maricopa County.

3. Age/Sex Of The Population

With regard to the age/sex profile of the Phoenix ADI, 45.2% of the populous is under 18 years of age with 31.5% being children under twelve. An additional 29.4% of the Market's Hispanics are between the ages of 18 and 34. Thus, fully three-fourths of the ADI's Hispanic population is under 35 years of age.

PHOENIX
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	51.1		14.6%	
Males 35 - 49	21.8		6.2	
Males 50 - 64	14.2		4.1	
Males 65+	5.9		1.7	
Males 18+		**93.0**		**26.6%**
Females 18 - 34	51.7		14.8	
Females 35 - 49	24.3		7.0	
Females 50 - 64	15.5		4.4	
Females 65+	7.2		2.1	
Females 18+		**98.7**		**28.3**
Teens (12 - 17)		**47.7**		**13.7**
Children (0 - 11)		**109.9**		**31.5**
TOTAL		**349.3**		**100.0%**

Source: Strategy Research Corporation

Hispanic males (18+) account for 26.6% of the total Hispanic population, whereas females (18+) represent 28.3% of the adult population.

4. Country Of Origin

The Mexican community dominates the Hispanic population of Phoenix. Almost nine out of every ten Hispanics in the Phoenix Market are of Mexican origin or descent.

5. Language Spoken At Home

Approximately six out of ten Phoenix Hispanics report that they speak Spanish when at home. Roughly three out of ten claim that they speak both Spanish and English at home.

6. Telephone Ownership

With regard to telephone ownership, 41% of Phoenix Hispanic households do not have a telephone. An additional 25% have unlisted phones.

7. Automobile Ownership

Approximately seven out of ten Phoenix Hispanic households own at least one automobile, and the average number of cars per household is 1.6.

8. Fast-Food Restaurant Patronage

Three-fourths of Phoenix Hispanics eat at or take food from fast-food hamburger and chicken type restaurants. Pizza places are slightly less popular as six out of ten Hispanics patronize these types of eating establishments.

9. Product Usage

Items such as tuna fish, frankfurters, evaporated milk, stomach and cold remedies, creme rinse, and insecticides register high levels of use by Phoenix Hispanic households.

MARKET - 15

SACRAMENTO/STOCKTON

1. Hispanic Population

This California market is projected to have a Hispanic population of approximately 344,500 persons in 1987, making it the fifteenth largest Hispanic ADI in the United States.

The ADI county with the highest Hispanic population is Sacramento (102,600), followed by San Joaquin with 91,700 persons. Stanislaus County registers as the third most Hispanic populated county within the ADI as 56,300 persons are expected to reside within the defined boundaries in 1987.

SACRAMENTO/STOCKTON
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Amador	CA	0.5	0.9	1.0	1.3
Calaveras	CA	0.5	0.9	1.2	1.5
Colusa	CA	1.8	2.5	3.0	3.2
Contra Costa East	CA	4.9	5.1	4.7	6.8
El Dorado West	Ca	1.3	4.0	2.9	3.9
Mono	CA	0.0	0.4	NA	0.6
Nevada	CA	0.5	1.5	2.2	2.4
Placer West	CA	4.5	8.2	8.6	10.7
Plumas	CA	0.2	0.6	0.8	0.8
Sacramento	CA	37.4	74.1	92.6	102.6
San Joaquin	CA	37.3	66.6	82.7	91.7
Sierra	CA	0.2	0.2	0.2	0.3
Solano East	CA	5.5	24.8	18.2	20.8
Stanislaus	CA	18.8	40.0	50.7	56.3
Sutter	CA	2.4	6.1	7.6	8.0
Toulumne	CA	1.0	1.8	2.2	2.6
Yolo	CA	11.0	19.3	23.4	25.4
Yuba	CA	2.2	4.4	5.3	5.6
TOTAL		130.0	261.4	307.3	344.5

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Since 1980, when Hispanics in the Sacramento/Stockton Market numbered 261,400, the population has increased by 83,100 Hispanics, a growth of 32% for the seven year period.

2. Hispanic Population/Households - Total Population

The eighteen county area encompasses a total population of approximately 2,705,300 persons. Overall, Hispanics account for 12.7% of this population base.

The constituent counties of Sacramento, San Joaquin and Stanislaus comprise 64% (1,730,000 persons) of the Market area's total population. In this regard, Hispanics in Sacramento, San Joaquin and Stanislaus (250,600) represent 14.5% of the tri-county's total population.

SACRAMENTO/STOCKTON
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Amador	CA	1.3	0.3	4.7%	27.7
Calaveras	CA	1.5	0.4	4.9	30.6
Colusa	CA	3.2	0.8	20.9	15.3
Contra Costa East	CA	6.8	2.0	8.8	77.3
El Dorado West	CA	3.9	1.2	5.0	78.0
Mono	CA	0.6	0.2	4.2	14.3
Nevada	CA	2.4	0.7	3.1	77.4
Placer West	CA	10.7	3.2	7.5	142.7
Plumas	CA	0.8	0.2	4.1	19.5
Sacramento	CA	102.6	31.6	10.8	950.0
San Joaquin	CA	91.7	25.5	21.1	434.6
Sierra	CA	0.3	0.1	6.7	4.5
Solano East	CA	20.8	5.7	11.5	180.9
Stanislaus	CA	56.3	14.2	16.3	345.4
Sutter	CA	8.0	2.1	12.7	63.0
Tuolumne	CA	2.6	0.7	5.7	45.6
Yolo	CA	25.4	7.2	18.2	139.6
Yuba	CA	5.6	1.5	9.5	58.9
TOTAL		344.5	97.6	12.7%	2,705.3

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

An estimated 97,600 households in the Sacramento/Stockton ADI are headed by persons of Hispanic origin or descent. A total of 31,600 (32%) of these households are located in Sacramento County, while over one-fourth (26%) are located in San Joaquin County. Stanislaus County accounts for 14,200 Hispanic-headed households or 15% of the total.

3. Age/Sex Of The Population

In this very young market, only 14% of the population is over the age of 49.

SACRAMENTO/STOCKTON
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	51.5		14.9%	
Males 35 - 49	27.2		7.9	
Males 50 - 64	16.9		4.9	
Males 65+	8.2		2.4	
Males 18+		**103.8**		**30.1%**
Females 18 - 34	50.6		14.7	
Females 35 - 49	26.9		7.8	
Females 50 - 64	14.8		4.3	
Females 65+	8.1		2.4	
Females 18+		**100.4**		**29.1**
Teens (12 - 17)		**46.1**		**13.4**
Children (0 - 11)		**94.2**		**27.3**
TOTAL		**344.5**		**100.0%**

Source: Strategy Research Corporation

Approximately 41% of all Hispanics in the Market are under 18 years of age, with an additional 30% under the age of 35.

4. Country Of Origin

In the Sacramento/Stockton Market the predominant group of Hispanics is that of Mexican-Americans. This portion of the Hispanic community accounts for two-thirds of the Area Hispanics.

5. Length Of Residency Of Head Of Household

Sacramento/Stockton Hispanic heads of household report living in the United States for approximately eleven years.

6. Language Spoken At Home

Seven out of ten Hispanics in the Sacramento/Stockton Area speak Spanish in the home.

7. Telephone Ownership

Twenty-nine percent of the Hispanic households in Sacramento do not own a telephone. Thirty-six percent have unlisted telephone numbers.

Thirty-five percent of the Hispanic households in the area have listed telephones.

8. Supermarket Patronage

Seventy percent of the Sacramento/Stockton Area Hispanics shop in American chain supermarkets most frequently for grocery-related items.

9. Product Usage

Sacramento/Stockton Hispanic households display high levels of use for such products as tomato sauce, crackers, ketchup, paper towels and pine disinfectants.

MARKET - 16

CORPUS CHRISTI

1. Hispanic Population

Corpus Christi is a Texas city located on the southeastern coast of the State. It is the sixteenth largest Hispanic Market in the United States. The twelve counties which make up the Corpus Christi ADI contain 340,900 Hispanic persons. This is an increase of over 41% since 1980 (241,400 in 1980).

CORPUS CHRISTI
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Aransas	TX	1.7	2.7	3.4	4.0
Bee	TX	7.4	11.9	14.0	16.4
Brooks	TX	6.1	7.2	7.7	8.9
Duval	TX	8.8	10.7	11.7	13.7
Jim Hogg	TX	3.7	4.7	5.0	5.3
Jim Wells	TX	17.8	24.5	29.0	34.4
Kenedy	TX	0.5	0.5	0.5	0.6
Kleberg	TX	12.8	17.4	20.0	23.1
Live Oak	TX	NA	NA	NA	4.5
Nueces	TX	87.8	131.3	155.8	186.6
Refugio	TX	3.0	3.6	3.9	4.4
San Patricio	TX	20.2	26.9	32.1	39.0
TOTAL		169.8	241.4	283.1	340.9

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The metropolitan area which consists of Nueces and San Patricio Counties, contains more than 66% of the Hispanics (225,600 persons) in the Corpus Christi ADI. Nueces County alone constitutes approximately 55% of the Hispanic population in this ADI.

2. Hispanic Population/Households - Total Population

The twelve county area which constitutes the Corpus Christi ADI encompasses a total population of approximately 639,800 persons. Of this total, more than one-half (53.3%) are of Hispanic origin/descent.

Fifty-two percent of Nueces County is Hispanic (186,600 Hispanics, 357,500 total population).

CORPUS CHRISTI
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Aransas	TX	4.0	1.0	19.6%	20.4
Bee	TX	16.4	4.5	48.8	33.6
Brooks	TX	8.9	2.5	86.4	10.3
Duval	TX	13.7	3.9	86.2	15.9
Jim Hogg	TX	5.3	1.8	91.4	5.8
Jim Wells	TX	34.4	9.5	69.6	49.4
Kenedy	TX	0.6	0.2	85.7	0.7
Kleberg	TX	23.1	6.3	54.9	42.1
Live Oak	TX	4.5	1.2	35.2	12.8
Nueces	TX	186.6	49.2	52.2	357.5
Refugio	TX	4.4	1.3	40.4	10.9
San Patricio	TX	39.0	9.2	48.5	80.4
TOTAL		340.9	90.6	53.3%	639.8

Source: U.S. Department of Commerce
Bureau of the Census,
Strategy Research Corporation

There are roughly 90,600 households in this Texan ADI which are headed by Hispanics. The majority (54%) of these households (49,200) are located within Nueces County boundaries.

3. Age/Sex Of The Population

Nearly 41% of the Hispanic Market in Corpus Christi is under the age of 18. Additionally, 69.5% are under the age of 35.

CORPUS CHRISTI
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	48.1		14.1%	
Males 35 - 49	21.8		6.4	
Males 50 - 64	16.9		5.0	
Males 65+	8.8		2.6	
Males 18+		**95.6**		**28.0%**
Females 18 - 34	49.1		14.4	
Females 35 - 49	27.0		7.9	
Females 50 - 64	19.2		5.6	
Females 65+	10.3		3.0	
Females 18+		**105.6**		**31.0**
Teens (12 - 17)		**46.3**		**13.6**
Children (0 - 11)		**93.4**		**27.4**
TOTAL		**340.9**		**100.0%**

Source: Strategy Research Corporation

Adult men make up 28% of the Hispanic population, while adult women comprise 31% of the Hispanic population.

4. Country Of Origin

Corpus Christi is another community where the Mexican population dominates the overall Hispanic population. Over 95% of the Hispanics of this market are Mexican.

5. Language Spoken At Home

Slightly over one-half (52%) of the Hispanics in Corpus Christi speak Spanish at home. Approximately 33% speak both English and Spanish at home.

6. Telephone Ownership

Slightly over one-quarter (26%) of Hispanic households in the Corpus Christi Market do not have a phone. Further, 27% have unlisted telephone numbers.

Forty-seven percent of the Hispanic households in the Market have listed telephones.

7. Credit Card Ownership

Approximately 40% of the Hispanics have credit cards. Department store cards are by far the most popular followed by gas company cards.

8. Supermarket Patronage

Clearly nine out of ten Hispanics do most of their grocery shopping in American chain type supermarkets, while 11% shop most frequently in Hispanic supermarkets.

9. Fast-Food Restaurant Patronage

Eating at fast-food restaurants in Corpus Christi is very popular among the Market's Hispanics. More than nine out of ten patronize hamburger and chicken type restaurants on a frequent basis.

10. Product Usage

Alcoholic beverages such as tequila, rum and brandy/cognac register a high level of use among Corpus Christi Hispanics.

MARKET - 17

DENVER

1. Hispanic Population

The Denver, Colorado Market is the nation's seventeenth largest Hispanic populated market. The area, which includes portions of Colorado, Nebraska and Wyoming, has a Hispanic population of 260,300 persons in 1987. This represents an increase in population of 17.8% since the 1980 Census and an increase of 107% since the 1970 Census.

DENVER
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Adams	CO	18.7	38.5	44.0	45.6
Alamoso	CO	NA	NA	4.0	NA
Arapahoe	CO	4.8	12.5	15.5	17.3
Boulder	CO	5.7	10.3	11.9	12.5
Chaffee	CO	0.8	1.3	1.3	1.3
Clear Creek	CO	0.3	0.3	0.3	0.3
Denver	CO	62.6	92.0	95.8	96.4
Douglas	CO	0.1	0.6	0.8	1.0
Eagle	CO	1.7	0.8	1.0	1.1
Elbert	CO	0.0	0.1	0.2	0.2
Garfield	CO	0.4	0.9	1.1	1.2
Gilpin	CO	0.0	*	0.1	0.1
Grand	CO	1.1	0.3	0.3	0.3
Gunnison	CO	0.2	0.3	0.4	0.4
Hinsdale	CO	NA	NA	0.0	*
Jackson	CO	0.1	*	0.1	0.1
Jefferson	CO	5.7	19.5	23.8	25.0
Kit Carson	CO	0.0	0.4	0.4	0.4
Lake	CO	1.6	2.1	2.3	2.4
Larimer	CO	4.4	8.8	10.0	11.0
Lincoln	CO	NA	NA	0.1	0.1
Logan	CO	NA	NA	1.4	1.4
Moffat	CO	0.3	0.7	0.8	0.8
Morgan	CO	1.7	2.7	2.9	3.0
Park	CO	0.0	0.1	0.2	0.2
Phillips	CO	0.0	0.1	0.1	0.1
Pitkin	CO	0.0	0.1	0.2	0.2
Prowers	CO	NA	NA	2.7	2.8
Rio Blanco	CO	0.1	0.2	0.2	0.2
Routt	CO	0.2	0.4	0.4	0.4
Sedgwick	CO	NA	NA	0.3	0.3
Summit	CO	0.0	0.2	0.2	0.2

Continued. . .

DENVER
HISPANIC POPULATION
1970, 1980, 1985, 1987
(Continued)

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Teller	CO	NA	NA	0.2	0.2
Washington	CO	0.0	*	0.1	0.1
Weld	CO	10.8	21.0	23.8	24.6
Yuma	CO	0.0	0.2	0.3	0.3
Box Butte	NE	NA	NA	NA	0.6
Cheyenne	NE	0.1	0.2	0.3	0.3
Dawes	NE	0.0	0.2	0.2	0.2
Keith	NE	0.0	0.4	0.4	NA
Kimball	NE	0.0	0.2	0.2	0.2
Albany	WY	1.9	1.9	2.0	2.0
Campbell	WY	0.0	0.6	NA	1.0
Carbon	WY	2.2	2.5	2.7	2.8
Goshen	WY	NA	NA	NA	1.0
Johnson	WY	0.0	*	NA	NA
Platte	WY	0.0	0.6	0.7	0.7
Niobrara	WY	NA	NA	0.0	NA
TOTAL		125.5	221.0	253.7	260.3

NA = Not Applicable

* Designates a Hispanic population of less than 100 persons

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Approximately 96,400 Hispanics (37% of the ADI total) reside in the City of Denver/Denver County. Meanwhile, the Metropolitan Statistical Area which includes the seven counties of Adams, Arapahoe, Boulder, Denver, Douglas, Gilpin and Jefferson, houses three-fourths of the Market's Hispanic population (196,900 persons).

2. Hispanic Population/Households - Total Population

For 1987, the total estimated population of the Denver ADI is 2,749,300 persons. With a population of 260,300, Hispanics will account for 9.5% of the total ADI population base.

Of the 44 counties, Denver County represents 19% of the total population, while Jefferson County, with a total population of 480,800 accounts for 17%. Hispanics in Denver County (96,400) comprise 18.5% of the county total. Although Hispanics represent only 5.2% of Jefferson County's population, many may not realize that this county is home for 25,000 Hispanics.

DENVER
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Adams	CO	45.6	12.7	15.6%	292.3
Arapahoe	CO	17.3	5.3	4.3	402.3
Boulder	CO	12.5	3.8	5.4	231.5
Chaffee	CO	1.3	0.4	9.3	14.0
Clear Creek	CO	0.3	0.1	3.6	8.3
Denver	CO	96.4	29.2	18.5	521.1
Douglas	CO	1.0	0.2	2.4	41.7
Eagle	CO	1.1	0.3	6.2	17.7
Elbert	CO	0.2	*	2.1	9.5
Garfield	CO	1.2	0.3	4.1	29.3
Gilpin	CO	0.1	*	3.4	2.9
Grand	CO	0.3	0.1	3.4	8.8
Gunnison	CO	0.4	0.1	3.1	12.9
Hinsdale	CO	*	*	2.8	0.5
Jackson	CO	0.1	*	2.7	3.7
Jefferson	CO	25.0	7.2	5.2	480.8
Kit Carson	CO	0.4	0.1	4.6	8.7
Lake	CO	2.4	0.7	23.3	10.3
Larimer	CO	11.0	3.2	5.8	189.7
Lincoln	CO	0.1	*	1.0	10.0
Logan	CO	1.4	0.4	6.4	21.9
Moffat	CO	0.8	0.2	4.8	16.7
Morgan	CO	3.0	0.8	11.7	25.6
Park	CO	0.2	*	2.4	8.3
Phillips	CO	0.1	*	2.6	3.8
Pitkin	CO	0.2	0.1	1.3	15.4
Prowers	CO	2.8	0.7	40.6	6.9
Rio Blanco	CO	0.2	*	3.0	6.7
Routt	CO	0.4	0.1	2.7	14.8

Continued . . .

DENVER
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Sedgwick	CO	0.3	0.1	9.7%	3.1
Summit	CO	0.2	0.1	1.7	11.8
Teller	CO	0.2	*	1.5	13.3
Washington	CO	0.1	*	1.6	6.3
Weld	CO	24.6	6.7	16.9	145.6
Yuma	CO	0.3	0.2	2.5	12.0
Box Butte	NE	0.6	0.2	3.8	15.8
Cheyenne	NE	0.3	0.2	2.6	11.5
Dawes	NE	0.2	*	1.7	11.8
Kimball	NE	0.2	0.1	3.3	6.1
Albany	WY	2.0	0.6	12.9	15.5
Campbell	WY	1.0	0.3	2.7	37.0
Carbon	WY	2.8	0.8	11.9	23.5
Goshen	WY	1.0	0.2	16.9	5.9
Platte	WY	0.7	0.2	5.0	14.0
TOTAL		260.3	80.1	9.5%	2,749.3

* Designates a population or household figure of less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Hispanic households in the Market total 80,100. In this regard, Hispanics have an average of 3.2 members per household.

3. Age/Sex Of The Population

Consistent with national patterns, the Hispanic residents of the Denver Market are younger than their non-Hispanic counterparts. Approximately 73% of the Market's Hispanic population is under the age of 35 with 39% under 18 years of age.

DENVER
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	43.5		16.7%	
Males 35 - 49	19.9		7.6	
Males 50 - 64	8.7		3.3	
Males 65+	4.8		1.8	
Males 18+		**76.9**		**29.5%**
Females 18 - 34	45.6		17.5	
Females 35 - 49	20.7		8.0	
Females 50 - 64	10.0		3.8	
Females 65+	5.3		2.0	
Females 18+		**81.6**		**31.3**
Teens (12 - 17)		**32.9**		**12.6**
Children (0 - 11)		**68.9**		**26.5**
TOTAL		**260.3**		**100.0%**

Source: Strategy Research Corporation

Adult Hispanic males account for 30% of the Market's population; similar to the adult female population which comprises 31% of the Hispanic population.

4. Country Of Origin

The vast majority of the Hispanic population of the Denver area is of Mexican descent.

5. Length Of Residency

Approximately 53% of the Market's Hispanics have resided in the United States for 25 or more years.

6. Fast-Food Restaurant Patronage

Patronage of hamburger type fast-food restaurants is high. Fully nine out of ten Denver Hispanics frequent these types of food establishments. Three-fourths of the Hispanics also patronize chicken fast-food restaurants.

7. Product Usage

Stand out items used by Denver Hispanic households are tea, margarine, flour and canned tomato paste, to name a few.

Products such as children's vitamins, cough syrup and baby food register lower incidence of usage among Denver Hispanic households.

MARKET - 18

PHILADELPHIA

1. Hispanic Population

Although approximately only 3% of the total population of the Philadelphia Market is Hispanic, this relatively small percentage actually represents a significant number.

From 1970 to 1987 the Hispanic population of this Market has more than tripled, from 71,200 in 1970 to 231,100 in 1987. In fact, Hispanic population growth has even been substantial for the seven years between 1980 and 1987 as a 27% increase in Hispanic population is seen.

For the period 1985 to 1987, a 2.7% increase in Hispanic population has been recorded for this ADI.

PHILADELPHIA
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Kent	DE	1.0	1.7	2.0	2.3
New Castle	DE	4.6	7.1	8.3	8.6
Atlantic	NJ	2.6	7.6	9.6	10.0
Burlington	NJ	2.6	8.7	11.1	11.6
Camden	NJ	7.3	20.6	26.4	27.4
Cape May	NJ	0.6	1.2	1.4	1.6
Cumberland	NJ	5.5	12.5	15.5	16.0
Gloucester	NJ	1.0	2.4	2.8	3.0
Mercer	NJ	3.3	10.6	13.7	14.3
Salem	NJ	0.4	1.0	1.3	1.3
Warren	NJ	0.6	0.1	1.1	NA
Berks	PA	2.7	9.0	11.0	11.2
Bucks	PA	1.7	5.7	7.1	7.2
Chester	PA	1.4	5.7	7.0	7.1
Delaware	PA	3.0	4.2	4.3	4.3
Lehigh	PA	1.0	7.1	9.2	9.4
Monroe	PA	0.1	0.6	0.7	0.7
Montgomery	PA	1.3	5.4	6.6	6.7
Northampton	PA	3.2	7.0	8.6	8.8
Philadelphia	PA	27.3	63.8	77.3	79.1
Schuylkill	PA	NA	NA	NA	0.5
TOTAL		71.2	182.0	225.0	231.1

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Philadelphia County contains 34.2% of the Hispanic population of the ADI (79,100 persons). Other counties with sizable numbers of Hispanics are Camden, Cumberland and Mercer with populations of 27,400, 16,000 and 14,300, respectively. These three counties are located in the New Jersey portion of the ADI.

2. Hispanic Population/Households - Total Population

With a Hispanic population of 231,100 and a total population of 7,997,400, the Philadelphia ADI is 2.9% Hispanic.

While 34% of the Hispanic ADI population is concentrated in Philadelphia County, they represent only 4.0% of the county's total population.

PHILADELPHIA
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Kent	DE	2.3	0.6	2.1%	109.5
New Castle	DE	8.6	2.4	2.0	430.0
Atlantic	NJ	10.0	2.8	4.7	212.8
Burlington	NJ	11.6	2.8	2.8	414.3
Camden	NJ	27.4	7.4	5.4	507.4
Cape May	NJ	1.6	0.4	1.7	94.1
Cumberland	NJ	16.0	4.3	11.4	140.4
Gloucester	NJ	3.0	0.9	1.4	214.3
Mercer	NJ	14.3	4.0	4.2	340.5
Salem	NJ	1.3	0.3	1.9	68.4
Berks	PA	11.2	3.3	3.0	373.3
Bucks	PA	7.2	2.1	1.2	600.0
Chester	PA	7.1	1.8	1.9	373.7
Delaware	PA	4.3	1.3	0.8	537.5
Lehigh	PA	9.4	2.9	2.7	348.1
Monroe	PA	0.7	0.2	0.9	77.8
Montgomery	PA	6.7	1.9	0.9	744.4
NorthHampton	PA	8.8	2.7	3.3	266.7
Philadelphia	PA	79.1	22.0	4.0	1,977.5
Schuylkill	PA	0.5	0.2	0.3	166.7
TOTAL		231.1	64.3	2.9%	7,997.4

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

There are an estimated 64,300 households headed by Hispanics in the Philadelphia ADI. One-third of these (34%) are located in Philadelphia County (22,000).

3. Age/Sex Of The Population

As is the case with most ADI's with large Hispanic concentrations, the Hispanic population of the Philadelphia ADI is very young. Almost 72% of these Hispanics are under 35 years of age, while well over a third (37.8%) are under the age of 18.

PHILADELPHIA
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	39.0		16.9%	
Males 35 - 49	16.9		7.3	
Males 50 - 64	8.9		3.9	
Males 65+	5.0		2.2	
Males 18+		**69.8**		**30.2%**
Females 18 - 34	39.3		17.0	
Females 35 - 49	17.9		7.7	
Females 50 - 64	10.8		4.7	
Females 65+	5.9		2.6	
Females 18+		**73.9**		**32.0**
Teens (12 - 17)		**26.9**		**11.6**
Children (0 - 11)		**60.5**		**26.2**
TOTAL		**231.1**		**100.0%**

Source: Strategy Research Corporation

Adults over the age of 49 make up only 13.4% of the Hispanic population.

4. Country Of Origin

With regard to ethnic composition, more than two-thirds of the metro is of Puerto Rican origin. Mexican-Americans account for 8% of the Hispanic population, while Cuban representation is less than 5%.

5. Language Spoken At Home

Roughly seven out of every ten Hispanics in Philadelphia speak Spanish in their homes.

6. Product Usage

Stand out items, in terms of usage by this Market's Hispanic households include luncheon meats, frankfurters, ketchup, mustard, flour, cola soft drinks, pasta and headache remedies.

MARKET - 19

TUCSON

1. Hispanic Population

The Tucson ADI is presently comprised of five counties which contain 208,400 Hispanics. The vast majority (75%) of these Hispanics (155,600) reside in Pima County, which is in essence the Tucson metro area.

Cochise County, with its 28,500 Hispanic residents, account for 14% of the ADI's Hispanic population; 10% of the ADI's Hispanic population resides in the County of Santa Cruz.

TUCSON
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Apache South	AZ	0.2	0.6	0.4	NA
Cochise	AZ	15.1	22.9	25.6	28.5
Pima	AZ	55.5	111.4	138.1	155.6
Graham	AZ	NA	NA	6.3	NA
Santa Cruz	AZ	8.2	15.2	18.3	20.3
Catron	NM	0.6	0.8	NA	0.9
Hidalgo	NM	2.4	2.8	3.0	3.1
TOTAL		82.0	153.7	191.7	208.4

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Over the past 17 years, the Tucson Market has experienced substantial growth in its Hispanic population. The number of Hispanic persons more than doubled during this time period - from 82,000 in 1970 to the 1987 figure of 208,400.

In the period 1980 to 1987, the Tucson ADI experienced an increase in Hispanic population of 54,700 persons.

2. Hispanic Population/Households - Total Population

Hispanics represent 25.9% of the total ADI population (208,400 Hispanics and 803,400 total persons). Pima County is the largest Hispanic county with 155,600 Spanish-speaking persons. On a percentage basis, however, Santa Cruz County is the most "Hispanic" area; as 82.9% of the population is Hispanic - 20,300 Hispanic persons versus a total of 24,500 persons.

TUCSON
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Cochise	AZ	28.5	8.2	29.0%	98.3
Pima	AZ	155.6	42.1	23.2	370.7
Santa Cruz	AZ	20.3	5.5	82.9	24.5
Catron	NM	0.9	0.3	27.3	3.3
Hidalgo	NM	3.1	0.9	47.0	6.6
TOTAL		208.4	57.0	25.9%	803.4

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The 57,000 Hispanic households in the Tucson ADI signify an average of 3.7 members per household.

3. Age/Sex Of The Population

Adult males comprise 29.5% of the Tucson Hispanic population, compared with 31.5% for adult females.

TUCSON
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	32.9		15.8%	
Males 35 - 49	14.8		7.1	
Males 50 - 64	9.0		4.3	
Males 65+	4.7		2.3	
Males 18+		**61.4**		**29.5%**
Females 18 - 34	33.4		16.0	
Females 35 - 49	15.5		7.4	
Females 50 - 64	10.8		5.2	
Females 65+	5.9		2.8	
Females 18+		**65.6**		**31.5**
Teens (12 - 17)		**25.2**		**12.1**
Children (0 - 11)		**56.2**		**27.0**
TOTAL		**208.4**		**100.0%**

Source: Strategy Research Corporation

Approximately seven out of every ten Hispanics in the Tucson Market are under the age of 35. Twenty-seven percent of the Hispanic population are children under the age of twelve, and 12% are teenagers between twelve and 17 years of age.

4. Country Of Origin

The Hispanics in this Arizona Market are predominantly Mexican, as more than nine out of every ten claim they are of Mexican origin or descent.

5. Telephone Ownership

Twenty-seven percent of the Hispanic households in the Tucson ADI do not have a phone. Forty-three percent have an unlisted telephone.

6. Product Usage

Hispanic households in Tucson use a wide variety of products. Items used by the vast majority of this Market's Hispanic households include fruit juice, tuna fish, processed cheese, tomato sauce, Latin ground coffee, and frankfurters.

MARKET - 20

AUSTIN

1. Hispanic Population

The Austin ADI, located in the southwestern portion of Texas, is comprised of twelve counties, with 170,800 Hispanic persons residing within its designated area. The Hispanic population has grown 194% in the 17 years between 1970 and 1987 (58,000 to 170,800).

AUSTIN
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Bastrop	TX	2.1	3.4	4.3	5.5
Blanco	TX	0.4	0.4	0.5	0.6
Burnet	TX	0.7	1.3	1.6	2.2
Caldwell	TX	5.8	7.8	8.8	10.6
Fayette	TX	0.3	1.0	1.2	1.3
Gillespie	TX	NA	NA	NA	2.0
Hays	TX	9.0	12.4	15.2	19.4
Lee	TX	0.1	0.6	0.8	1.0
Llano	TX	0.1	0.3	0.3	0.4
Mason	TX	0.4	0.6	0.7	0.8
San Saba	TX	0.7	0.8	NA	NA
Travis	TX	33.5	72.3	91.5	110.3
Williamson	TX	4.9	9.7	13.1	16.7
TOTAL		58.0	110.6	138.0	170.8

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Travis County, which encompasses the City of Austin, has 110,300 Hispanic persons. The tri-county metropolitan area (Travis, Hays and Williamson counties) make up 85.7% of the Hispanic population in the Austin Market.

2. Hispanic Population/Households - Total Population

A total of 910,700 persons reside in the Austin, Texas ADI. Of this amount, 18.8% are of Hispanic origin or descent.

Travis County, which is home to 110,300 Hispanics, accounts for two-thirds (67.7%) of the area's Hispanic households.

AUSTIN
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Bastrop	TX	5.5	1.4	15.5%	35.5
Blanco	TX	0.6	0.2	9.4	6.4
Burnet	TX	2.2	0.5	8.3	26.5
Caldwell	TX	10.6	2.7	36.7	28.9
Fayette	TX	1.3	0.3	6.0	21.7
Gillespie	TX	2.0	0.5	11.4	17.5
Hays	TX	19.4	4.9	34.3	56.6
Lee	TX	1.0	0.2	6.4	15.6
Llano	TX	0.4	0.1	2.7	14.8
Mason	TX	0.8	0.2	16.7	4.8
Travis	TX	110.3	31.5	19.5	565.6
Williamson	TX	16.7	4.0	14.3	116.8
TOTAL		170.8	46.5	18.8%	910.7

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Given a Hispanic population of 170,800 persons, and households of 46,500, the average number of persons per Hispanic household in this Texas ADI equates to 3.7.

3. Age/Sex Of The Population

Approximately 35% of the Hispanic population is between the ages of 18 and 34, while 39% are under the age of 18.

AUSTIN
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	30.0		17.6%	
Males 35 - 49	10.6		6.2	
Males 50 - 64	6.7		3.9	
Males 65+	3.4		2.0	
Males 18+		**50.7**		**29.7%**
Females 18 - 34	28.9		16.9	
Females 35 - 49	11.9		7.0	
Females 50 - 64	8.3		4.9	
Females 65+	4.4		2.6	
Females 18+		**53.5**		**31.3**
Teens (12 - 17)		**20.1**		**11.8**
Children (0 - 11)		**46.5**		**27.2**
TOTAL		**170.8**		**100.0%**

Source: Strategy Research Corporation

The adult Hispanic market in the Austin ADI is somewhat equal in terms of sex with 29.7% being male and 31.3% female.

4. Country of Origin

The predominant group of Hispanics in Austin is, as in all of Texas, the Mexican community. Mexican-Americans represent over 85% of the Hispanics in this market.

5. Language Spoken At Home

Roughly 50% of the Austin Hispanic population speak Spanish most frequently in their homes.

6. Fast-Food Restaurant Patronage

Patronage of fast-food restaurants is high among the Market's Hispanics. Hamburger type fast-food restaurants are patronized by approximately 85% of the Austin area Hispanics; a similar percentage also patronize fast-food chicken restaurants.

7. Credit Card Ownership

Approximately, six out of ten Hispanics in this ADI have credit cards. Department store credit cards are the most popular, while travel/entertainment cards are the least popular.

8. Product Usage

Food and beverage products showing considerable levels of usage among Austin Hispanic households include ketchup, margarine, frozen fruit bars, cola soft drinks, crackers and tomato sauce.

MARKET - 21

SALINAS/MONTEREY

1. Hispanic Population

The Hispanic population of the Salinas/Monterey Market more than doubled in the ten year period from 1970 to 1980 (55,300 to 114,200). In this same period of time, the non-Hispanic population rose 29%, from 389,500 persons to 503,600.

Meanwhile, the Market registers an increase of 50,900 Hispanic persons in the 1980 - 1987 time period, an increase of 45%.

SALINAS/MONTEREY
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Monterey	CA	38.1	75.1	91.0	106.6
San Benito	CA	6.4	11.4	14.1	17.1
Santa Cruz	CA	10.8	27.7	36.1	41.4
TOTAL		55.3	114.2	141.2	165.1

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Within this tri-county ADI, Monterey County accounts for the highest concentration of Hispanic population (106,600 persons). Santa Cruz, with a Hispanic population of 41,400 ranks second, followed by San Benito County with a Hispanic population of 17,100.

2. Hispanic Population/Households - Total Population

Overall, nearly 700,000 persons have chosen residency in the Salinas/Monterey area. Hispanics, in this regard, represent 23.6% of the ADI's total population base.

More than one-fourth of Monterey County (27.3%) is made up of Hispanics, while 47% of San Benito County and 15% of Santa Cruz County consists of persons of Hispanic origin.

SALINAS/MONTEREY
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Monterey	CA	106.6	29.6	27.3%	390.5
San Benito	CA	17.1	4.4	46.5	36.8
Santa Cruz	CA	41.4	10.5	15.2	272.4
TOTAL		165.1	44.5	23.6%	699.7

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

In total, there are 44,500 households in the Salinas/Monterey ADI which are headed by persons of Hispanic origin/descent; two-thirds of these households (66.5%) are located in Monterey County.

3. Age/Sex Of The Population

More than one-third (36.7%) of the Hispanics residing in the Salinas/Monterey Market are under 18 years of age.

SALINAS/MONTEREY
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	35.7		21.6%	
Males 35 - 49	11.4		6.9	
Males 50 - 64	6.7		4.1	
Males 65+	3.4		2.1	
Males 18+		**57.2**		**34.6%**
Females 18 - 34	25.3		15.3	
Females 35 - 49	11.6		7.0	
Females 50 - 64	7.0		4.2	
Females 65+	3.5		2.1	
Females 18+		**47.4**		**28.7**
Teens (12 - 17)		**18.8**		**11.4**
Children (0 - 11)		**41.7**		**25.3**
TOTAL		**165.1**		**100.0%**

Source: Strategy Research Corporation

Adult males comprise 34.6% of the Market's Hispanic population, while females constitute 28.7% of the total Hispanic population.

4. Country Of Origin

With regard to type of Hispanic origin, approximately 93% of the Hispanics living in the Salinas/Monterey area are Mexican-Americans.

5. Language Spoken At Home

Spanish is the spoken language in the majority (67%) of Hispanic households in the Salinas/Monterey area.

6. Telephone Ownership

A large portion (46%) of the Hispanic households in Salinas do not have telephones. Another 29% of Hispanic households have unlisted telephones.

One-quarter of the Hispanic households in this Market have listed telephones.

7. Fast-Food Restaurant Patronage

At least three-fourths of the Hispanics in this ADI frequent hamburger and/or chicken type fast-food restaurants.

8. Product Usage

Food and beverage products such as fruit juice, children's powdered drinks, American ground coffee, American instant coffee, tuna fish, processed cheese, mustard, barbecue sauce, chocolate milk additives, carbonated soft drinks, frozen fruit juices, luncheon meats, frankfurters/weiners and ketchup, just to name a few, are quite popular in Salinas/Monterey Hispanic households.

MARKET - 22

TAMPA/ST. PETERSBURG

1. Hispanic Population

The Tampa/St. Petersburg Market ranks 22nd in the nation with an estimated Hispanic population of 140,300 in 1987. This represents approximately a 38% increase in population from that recorded by the 1980 Census.

Two years prior, in 1985, the ADI's Hispanic population totaled 122,700 persons. Thus, the 140,300 figure for 1987 represents an increase in Hispanic population of 14.3% (17,300 persons).

TAMPA/ST. PETERSBURG
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Citrus	FL	0.2	0.8	1.0	1.3
De Soto	FL	0.1	0.6	0.8	0.9
Hardee	FL	2.2	3.2	3.6	4.4
Hernando	FL	0.2	0.8	1.0	1.4
Highlands	FL	0.2	0.8	2.1	2.4
Hillsborough	FL	52.5	64.2	73.0	84.4
Manatee	FL	1.4	3.2	4.1	4.5
Pasco	FL	1.1	4.7	6.6	7.0
Pinellas	FL	5.2	10.5	13.6	15.0
Polk	FL	3.4	9.6	13.3	14.9
Sarasota	FL	1.9	3.0	3.6	4.1
TOTAL		68.4	101.4	122.7	140.3

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Pinellas County, with an estimated total population of 937,500 persons in 1987 will be Florida's third most populated county. Similarly, Hillsborough County is projected to have an overall population of 781,500 persons in 1987, making it Florida's fourth most populous county. The Hispanic population is highly concentrated in Hillsborough County (84,400 persons); the City of Tampa alone houses approximately 56% of the county's total Hispanic population.

In fact, approximately three-fourths of the Market's Hispanics live within the metropolitan area (Hillsborough, Pasco and Pinellas Counties).

2. Hispanic Population/Households - Total Population

Hispanics comprise 4.4% of the Tampa/St. Petersburg ADI.

TAMPA/ST. PETERSBURG
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Citrus	FL	1.3	0.4	1.5%	86.7
De Soto	FL	0.9	0.2	3.5	25.7
Hardee	FL	4.4	0.9	17.3	25.4
Hernando	FL	1.4	0.4	1.9	73.7
Highlands	FL	2.4	0.5	3.8	63.2
Hillsborough	FL	84.4	30.6	10.8	781.5
Manatee	FL	4.5	1.1	2.5	180.0
Pasco	FL	7.0	1.8	2.5	280.0
Pinellas	FL	15.0	5.4	1.6	937.5
Polk	FL	14.9	3.1	3.2	465.6
Sarasota	FL	4.1	1.3	1.5	273.3
TOTAL		140.3	45.7	4.4%	3,192.6

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

A total of 45,700 households are headed by persons of Hispanic origin/descent. Approximately two-thirds of these households are situated in Hillsborough County (30,600).

3. Age/Sex Of The Population

Almost one-half (46.7%) of the Tampa/St. Petersburg Market Hispanic population is under 18 years of age.

TAMPA/ST. PETERSBURG HISPANIC AGE/SEX DISTRIBUTION 1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	19.9		14.2%	
Males 35 - 49	11.7		8.3	
Males 50 - 64	8.5		6.1	
Males 65+	4.7		3.3	
Males 18+		**44.8**		**31.9%**
Females 18 - 34	20.2		14.4	
Females 35 - 49	12.4		8.8	
Females 50 - 64	10.6		7.6	
Females 65+	5.6		4.0	
Females 18+		**48.8**		**34.8**
Teens (12 - 17)		**16.5**		**11.8**
Children (0 - 11)		**30.2**		**21.5**
TOTAL		**140.3**		**100.0%**

Source: Strategy Research Corporation

Adult males constitute 31.9% of the Hispanic population base, while adult females make up 34.8% of the market area.

4. Country Of Origin

The Hispanic community of Tampa/St. Petersburg is predominantly of Cuban origin influenced by the massive immigration from Cuba since 1960 and the last group arriving from the Mariel boatlift in 1980. The greatest migratory period was from 1960 to 1979, which accounts for 69% of the total immigrants. The second most important migratory period was from 1930 to 1959, with 18% of the immigrants arriving during that era. The third group that arrived in 1980 accounts for 11% of the total immigration.

5. Language Spoken At Home

In the Tampa/St. Petersburg Market, as in the Miami Market, Hispanics prefer speaking Spanish in their homes. Eighty-one percent speak Spanish at home, while another twelve percent speak both Spanish and English at home.

6. Home Ownership

Approximately nine out of ten Tampa/St. Petersburg Hispanics live in single family homes and most own their own homes.

MARKET - 23

BOSTON

1. Hispanic Population

In the decade period 1970 - 1980, the Hispanic population in the Boston Market doubled in size (51,900 persons versus 109,600 persons). Hispanic population growth continues as an increase of 22% is seen for the 1980 - 1987 period.

The Boston ADI is comprised of seventeen counties. Suffolk County, Massachusetts records the highest concentration of Hispanic population at 49,600 persons, while the second largest penetration of Hispanics is in Middlesex County, Massachusetts (28,400 persons of Hispanic origin).

BOSTON
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Barnstable	MA	1.0	1.0	1.3	1.3
Essex	MA	5.9	16.9	20.1	20.5
Franklin	MA	NA	NA	NA	0.4
Middlesex	MA	12.8	23.5	28.0	28.4
Nantucket	MA	*	*	0.0	*
Norfolk	MA	3.5	4.6	4.9	4.9
Plymouth	MA	2.3	4.4	5.0	5.0
Suffolk	MA	19.0	40.1	48.6	49.6
Worcester	MA	5.3	14.2	17.7	18.1
Belknap	NH	NA	NA	0.2	0.2
Cheshire	NH	0.2	0.2	0.3	0.3
Hillsborough	NH	0.9	2.2	2.4	2.5
Merrimack	NH	0.3	0.4	0.5	0.5
Rockingham	NH	0.6	1.2	1.3	1.5
Strafford	NH	0.1	0.5	0.5	0.5
Sullivan	NH	*	0.1	0.1	0.1
Windham	VT	*	0.3	0.3	0.3
TOTAL		51.9	109.6	131.2	134.1

* Designates a Hispanic population of less than 100 persons.

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The City of Boston, located in Suffolk County, represents approximately 90% of that county's Hispanic population.

2. Hispanic Population/Households - Total Population

Hispanics in the Boston ADI represent 2.2% of the total population base of 6,181,800 persons.

Middlesex, the state's most populated county overall, has a Hispanic population of 28,400. These Hispanics represent 1.8% of the total county population (1,577,800 persons).

Suffolk is Massachusetts' third most populated county, and Hispanics comprise **6.6% of Suffolk** County's population of 751,500 persons.

BOSTON
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Barnstable	MA	1.3	0.4	0.7%	185.7
Essex	MA	20.5	6.1	2.8	732.1
Franklin	MA	0.4	0.1	0.6	69.0
Middlesex	MA	28.4	8.6	1.8	1,577.8
Nantucket	MA	*	*	0.7	5.9
Norfolk	MA	4.9	1.5	0.8	612.5
Plymouth	MA	5.0	1.5	1.1	454.5
Suffolk	MA	49.6	15.3	6.6	751.5
Worcester	MA	18.1	5.2	2.3	787.0
Belknap	NH	0.2	0.1	0.4	50.0
Cheshire	NH	0.3	0.1	0.4	75.0
Hillsborough	NH	2.5	0.8	0.8	312.5
Merrimack	NH	0.5	0.2	0.4	125.0
Rockingham	NH	1.5	0.4	0.6	250.0
Strafford	NH	0.5	0.2	0.5	100.0
Sullivan	NH	0.1	*	0.3	33.3
Windham	VT	0.3	0.1	0.5	60.0
TOTAL		134.1	40.6	2.2%	6,181.8

* Designates a population or household figure of less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

A total of 40,600 households in the Boston ADI are headed by persons of Hispanic origin/descent. The average number of persons per Hispanic household, therefore, equates to approximately 3.3.

3. Age/Sex Of The Population

There are approximately the same number of adult Hispanic males as there are females in the Boston Market, each representing approximately 32% of the area's total Hispanic population.

BOSTON
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	27.6		20.6%	
Males 35 - 49	9.7		7.2	
Males 50 - 64	3.8		2.8	
Males 65+	2.2		1.6	
Males 18+		**43.3**		**32.3%**
Females 18 - 34	25.7		19.2	
Females 35 - 49	9.9		7.4	
Females 50 - 64	5.2		3.9	
Females 65+	2.7		2.0	
Females 18+		**43.5**		**32.4**
Teens (12 - 17)		**13.8**		**10.3**
Children (0 - 11)		**33.5**		**25.0**
TOTAL		**134.1**		**100.0%**

Source: Strategy Research Corporation

Children under twelve represent one-fourth of the Market's Hispanic population, while an additional 10% are between twelve and 17 years of age.

4. Country Of Origin

The Hispanic market in the Boston area is somewhat diverse, however, the single largest national group is the Puerto Rican community, which represents slightly less than half (45%) of the Hispanic population. Dominicans and Central and South Americans represent an additional 41% of the Boston area Hispanics.

MARKET - 24

LAREDO

1. Hispanic Population

The Laredo Market, located in the southern portion of the State of Texas, is comprised of Webb and Zapata Counties. In 1987 it is estimated that there will be 131,900 Hispanics residing in this ADI.

LAREDO
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Webb	TX	53.8	90.8	106.9	124.1
Zapata	TX	3.7	5.0	6.2	7.8
TOTAL		57.5	95.8	113.1	131.9

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The 1987 estimate of Hispanic population represents a 16.6% increase over the 1985 level (131,900 versus 113,100, respectively).

Since the conduct of the 1980 U.S. Census, the current Laredo ADI's Hispanic population will have shown an increase of more than one-third (37.7%).

2. Hispanic Population/Households - Total Population

More than ninety percent (91.5%) of the Laredo ADI population is of Hispanic origin/descent.

LAREDO
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (00C)	Percent Of Total Population	Total Population (000)
Webb	TX	124.1	31.8	92.6%	134.0
Zapata	TX	7.8	2.0	77.2	10.1
TOTAL		131.9	33.8	91.5%	144.1

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

A total of 92.6% of the Webb County population is Hispanic and there are 31,800 households in Webb headed by persons of Hispanic origin or descent.

In addition, 77.2% of Zapata County is also Hispanic; there are 2,000 Hispanic households located in Zapata County.

3. Age/Sex Of The Population

With regard to the age/sex distribution of the Hispanic population, approximately 40% of the Hispanics in this Texas Market are under 18 years of age.

LAREDO
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	15.7		11.9%	
Males 35 - 49	8.5		6.4	
Males 50 - 64	7.2		5.5	
Males 65+	4.0		3.0	
Males 18+		**35.4**		**26.8%**
Females 18 - 34	17.4		13.2	
Females 35 - 49	10.5		8.0	
Females 50 - 64	10.5		8.0	
Females 65+	5.4		4.1	
Females 18+		**43.8**		**33.2**
Teens (12 - 17)		**16.2**		**12.3**
Children (0 - 11)		**36.5**		**27.7**
TOTAL		**131.9**		**100.0%**

Source: Strategy Research Corporation

Adult males represent 27% of the population, while adult females comprise 33% of the Market's Hispanic population.

4. Country Of Origin

For the most part, Mexicans constitute the Hispanic population base within the Laredo ADI as they represent 95% of all Hispanics in the Market area.

5. Language Spoken At Home

Forty-five percent of Laredo Hispanics report that they speak Spanish in their homes. Meanwhile, another fifty-two percent speak both English and Spanish at home.

MARKET - 25

ODESSA/MIDLAND

1. Hispanic Population

The 25th largest Market with regard to Hispanic population is Odessa/Midland, Texas in which reside 129,300 persons of Hispanic origin. This figure represents an increase in the number of Hispanic persons in the area of 16.2% from the 1970 total figure of 49,300.

The Hispanic population in this ADI shows a continual increase. In 1980, a total of 90,300 Hispanics resided in the area, compared to 106,600 in 1985 and 129,300 in 1987. The 1987 figure represents an increase in Hispanic population of 21% since 1985.

ODESSA/MIDLAND
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Lea South	NM	0.7	1.2	2.0	2.1
Andrews	TX	0.5	2.9	4.0	4.4
Brewster	TX	3.3	3.3	3.5	4.0
Crane	TX	0.3	1.2	1.3	1.4
Crockett	TX	1.1	2.1	2.5	2.7
Culberson	TX	1.5	2.1	NA	NA
Ector	TX	9.7	24.8	32.0	38.5
Gaines	TX	NA	NA	NA	5.5
Glasscock	TX	0.3	0.4	0.4	0.4
Howard	TX	4.7	7.0	7.6	8.3
Jeff Davis	TX	0.7	0.8	1.0	1.2
Loving	TX	0.1	*	*	*
Martin	TX	1.4	1.6	1.9	2.1
Midland	TX	5.1	12.3	15.9	19.9
Pecos	TX	4.1	7.1	8.4	9.8
Presidio	TX	3.2	4.0	4.4	5.0
Reagan	TX	0.4	1.3	1.6	1.9
Reeves	TX	7.2	9.8	10.7	11.5
Terrell	TX	0.7	0.7	0.7	0.7
Upton	TX	0.8	1.3	1.4	1.8
Ward	TX	2.5	3.8	4.3	4.8
Winkler	TX	1.0	2.6	3.0	3.3
TOTAL		49.3	90.3	106.6	129.3

NA = Not Applicable

* Designates a Hispanic population of less than 100 persons.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Approximately **45%, or 58,400 of the Hispanic** population of this Market reside in **Ector and Midland Counties.** A total of **38,500** Hispanics make Ector County their home, while **19,900 live in Midland County.** The Hispanic population of Ector County has almost quadrupled since 1970.

2. Hispanic Population/Households - Total Population

A total of 466,900 persons reside in the Odessa/Midland ADI. Persons of Hispanic origin or descent represent 28% of the total population base.

ODESSA/MIDLAND
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Lea South	NM	2.1	0.5	21.0%	10.0
Andrews	TX	4.4	1.1	24.0	18.3
Brewster	TX	4.0	1.1	47.1	8.5
Crane	TX	1.4	0.4	25.9	5.4
Crockett	TX	2.7	0.7	49.1	5.5
Ector	TX	38.5	10.1	24.2	159.1
Gaines	TX	5.5	1.3	34.4	16.0
Glasscock	TX	0.4	0.1	28.6	1.4
Howard	TX	8.3	2.2	23.2	35.8
Jeff Davis	TX	1.2	0.3	54.5	2.2
Loving	TX	*	*	20.0	0.1
Martin	TX	2.1	0.5	38.9	5.4
Midland	TX	19.9	5.1	16.9	117.8
Pecos	TX	9.8	2.4	53.8	18.2
Presidio	TX	5.0	1.4	84.7	5.9
Reagan	TX	1.9	0.4	35.8	5.3
Reeves	TX	11.5	2.8	68.5	16.8
Terrell	TX	0.7	0.3	43.8	1.6
Upton	TX	1.8	0.4	31.0	5.8
Ward	TX	4.8	1.2	29.4	16.3
Winkler	TX	3.3	0.8	28.7	11.5
TOTAL		129.3	33.1	27.7%	466.9

* Designates a population or household figure of less than 100 persons.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Households within this ADI which are headed by Hispanics total 33,100. Thus, there is an average 3.9 persons per Hispanic household in the Odessa/Midland ADI.

3. Age/Sex Of The Population

Adult women make up 29.0% of the Hispanic population, while adult men constitute 28.5%.

ODESSA/MIDLAND
HISPANIC AGE/SEX DISTRIBUTION
1987

	1987 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	19.9		15.4%	
Males 35 - 49	9.0		7.0	
Males 50 - 64	5.1		3.9	
Males 65+	2.9		2.2	
Males 18+		**36.9**		**28.9%**
Females 18 - 34	19.4		15.0	
Females 35 - 49	9.4		7.3	
Females 50 - 64	5.5		4.3	
Females 65+	3.1		2.4	
Females 18+		**37.4**		**28.9**
Teens (12 - 17)		**17.5**		**13.5**
Children (0 - 11)		**37.5**		**29.0**
TOTAL		**129.3**		**100.0%**

Source: Strategy Research Corporation

The Hispanic population of the Odessa/Midland area can be considered quite young; 72.9% are under the age of 35, while about 42.5% are 17 years of age or younger. Children under the age of twelve represent 29.0% of the ADI's Hispanic population.

4. Country Of Origin

Approximately 96% of the Hispanics in the Odessa/Midland Market are of Mexican descent.

MARKET - 26

LUBBOCK

1. Hispanic Population

The Hispanic population of the Lubbock Market more than doubled in the 17 year period from 1970 to 1987 (62,000 to 124,000).

A total of 55,200 Hispanics reside in Lubbock County, an increase of 13.3%, or 6,500 persons, since 1985.

Hale County, the second most populated county in the ADI, is home to 16,400 Hispanics.

LUBBOCK
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
De Baca	NM	0.3	0.8	0.9	NA
Roosevelt	NM	NA	NA	3.8	NA
Bailey	TX	1.9	2.8	3.1	3.3
Borden	TX	0.0	0.1	0.1	0.1
Cochran	TX	1.2	1.7	1.8	2.1
Crosby	TX	2.3	3.3	3.5	3.8
Dawson	TX	4.7	6.1	6.7	7.5
Dickens	TX	0.4	0.6	0.7	0.7
Floyd	TX	2.3	3.3	3.7	3.9
Gaines	TX	2.4	4.0	4.7	NA
Garza	TX	0.7	1.3	1.5	1.5
Hale	TX	6.9	12.7	15.1	16.4
Hockley	TX	3.5	6.3	7.7	8.7
Kent	TX	0.2	0.1	0.1	0.1
King	TX	NA	NA	NA	*
Lamb	TX	3.5	5.8	6.4	7.0
Lubbock	TX	24.2	41.4	48.7	55.2
Lynn	TX	2.1	3.3	3.5	3.9
Motley	TX	0.0	0.2	0.2	0.2
Scurry	TX	1.3	3.4	4.1	NA
Terry	TX	3.0	5.0	5.6	6.3
Yoakum	TX	1.1	2.3	2.8	3.3
TOTAL		62.0	104.5	124.7	124.0

NA = Not Applicable

* Designates a population on household figure of less than 100 persons

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Approximately four out of ten Hispanic persons within this ADI live in the metro area. This is contrary to the national trend which shows Hispanics heavily concentrated in metropolitan areas.

2. Hispanic Population/Households - Total Population

A total of 27.5% of the Lubbock ADI is inhabited by Hispanics. Numerically, 451,100 persons live in this market area, 124,000 of whom are of Hispanic origin/descent.

LUBBOCK
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Bailey	TX	3.3	0.7	37.9%	8.7
Borden	TX	0.1	*	14.3	0.7
Cochran	TX	2.1	0.5	38.9	5.4
Crosby	TX	3.8	0.8	40.9	9.3
Dawson	TX	7.5	1.8	41.9	17.9
Dickens	TX	0.7	0.2	17.5	4.0
Floyd	TX	3.9	0.8	36.8	10.6
Garza	TX	1.5	0.4	26.8	5.6
Hale	TX	16.4	4.0	37.4	43.9
Hockley	TX	8.7	2.0	30.3	28.7
Kent	TX	0.1	*	7.7	1.3
King	TX	*	*	10.3	0.4
Lamb	TX	7.0	1.5	33.3	21.0
Lubbock	TX	55.2	13.8	21.7	254.4
Lynn	TX	3.9	0.8	41.5	9.4
Motley	TX	0.2	*	8.0	2.5
Terry	TX	6.3	1.5	37.7	16.7
Yoakum	TX	3.3	0.8	31.1	10.6
TOTAL		124.0	29.7	27.5%	451.1

* Designates a population or household figure of less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

There are a total of 29,700 households in this Texas ADI headed by Hispanic persons. Of this household total, 46% (13,800) are located in Lubbock County. Hale County has 4,000 Hispanic households (13% of the total).

3. Age/Sex Of The Population

In this very young market, only 9.5% of the Hispanic population are adults over 49 years of age.

LUBBOCK
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	19.1		15.4%	
Males 35 - 49	8.4		6.9	
Males 50 - 64	3.9		3.1	
Males 65+	2.0		1.6	
Males 18+		**33.4**		**26.9%**
Females 18 - 34	18.9		15.2	
Females 35 - 49	8.6		6.9	
Females 50 - 64	4.0		3.2	
Females 65+	2.0		1.6	
Females 18+		**33.5**		**27.0**
Teens (12 - 17)		**18.5**		**14.9**
Children (0 - 11)		**38.6**		**31.1**
TOTAL		**124.0**		**100.0%**

Source: Strategy Research Corporation

The Hispanic population of the Lubbock Market is evenly distributed between adult males and females.

4. Country Of Origin

With regard to country of origin of the Hispanic population, Lubbock, like all of Texas, is predominantly Mexican. Ninety-five percent of Lubbock area Hispanics are of Mexican origin/descent.

5. Language Spoken At Home

Roughly one-half of the Hispanics in Lubbock speak Spanish at home, while another 45% speak both English and Spanish in their homes.

MARKET - 27

WASHINGTON D.C.

1. Hispanic Population

The Washington D.C. ADI is comprised of 39 counties which fall in portions of Maryland, Virginia, West Virginia and Pennsylvania. The Market contains a total of 114,400 Hispanic persons. The Hispanic population in this market has shown an increase of 68%, or over 46,200 Hispanic persons since 1970.

WASHINGTON D.C.
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
District of Columbia	DC	15.9	17.7	18.6	18.8
Allegany	MD	0.0	0.3	0.3	0.3
Calvert	MD	0.0	0.3	0.3	0.3
Charles	MD	0.0	0.9	1.1	1.1
Frederick	MD	0.4	0.8	1.0	1.0
Montgomery	MD	15.7	22.8	25.7	26.5
Prince George's	MD	14.5	14.4	15.0	15.4
St. Mary's	MD	0.8	0.8	0.9	0.9
Washington	MD	0.0	0.7	0.7	0.7
Franklin	PA	0.0	0.6	0.7	0.8
Fulton	PA	0.0	*	NA	0.1
Alexandria	VA	0.0	4.0	4.3	4.4
Arlington	VA	6.3	8.9	10.2	10.4
Clarke	VA	0.0	*	0.1	0.1
Culpeper	VA	0.0	0.2	0.2	0.2
Fairfax	VA	11.8	19.5	22.9	23.7
Fairfax City	VA	0.0	0.4	0.5	0.6
Falls Church	VA	0.0	0.3	0.3	0.3
Fauquier	VA	0.0	0.1	0.3	0.3
Frederick	VA	0.0	0.1	0.1	0.1
Fredericksburg	VA	0.0	0.1	0.1	0.1
King George	VA	0.0	0.1	0.1	0.1
Loudoun	VA	0.5	0.8	1.1	1.1
Madison	VA	0.0	0.0	NA	NA
Manassas City	VA	0.0	0.2	0.2	0.2
Manassas Park	VA	0.0	*	0.1	0.1
Page	VA	0.0	0.1	0.1	0.1
Prince William	VA	2.3	3.3	3.7	4.0
Rappahannock	VA	0.0	0.1	0.1	0.1
Shenandoah	VA	0.0	0.2	0.2	0.2
Spotsylvania	VA	0.0	0.3	0.4	0.4
Stafford	VA	0.0	0.5	0.6	0.6
Warren	VA	0.0	0.2	0.2	0.2
Westmoreland	VA	0.0	0.1	0.1	0.1
Winchester	VA	0.0	0.1	0.1	0.1

Continued. . .

WASHINGTON D.C.
HISPANIC POPULATION
1970, 1980, 1985, 1987
(Continued)

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Berkeley	WV	0.0	0.3	0.4	0.4
Hampshire	WV	0.0	0.1	0.1	0.1
Hardy	WV	0.0	*	NA	NA
Jefferson	WV	0.0	0.2	0.3	0.3
Mineral	WV	0.0	0.1	0.1	0.1
Morgan	WV	0.0	*	0.1	0.1
TOTAL		68.2	99.6	111.3	114.4

NA = Not Applicable

* Designates a Hispanic population of less than 100 persons.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

A total of 18,800 Hispanic persons reside in the District of Columbia, while 50,200 Hispanic persons have residence in Montgomery County, Maryland and Fairfax County, Virginia.

2. Hispanic Population/Households - Total Population

The Washington D.C. ADI is comprised of 114,400 Hispanics, representing 2.5% of the total population of 4,588,700 persons.

WASHINGTON D.C.
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
District Of Columbia	DC	18.8	6.5	2.6%	723.1
Allegany	MD	0.3	0.1	0.4	75.0
Calvert	MD	0.3	0.1	0.8	37.5
Charles	MD	1.1	0.3	1.3	84.6
Frederick	MD	1.0	0.2	0.7	142.9
Montgomery	MD	26.5	7.8	4.0	662.5
Prince George's	MD	15.4	4.6	2.3	669.6
St. Mary's	MD	0.9	0.2	1.3	69.2
Washington	MD	0.7	0.2	0.6	116.7
Franklin	PA	0.8	0.3	0.5	160.0
Fulton	PA	0.1	*	0.7	14.0
Alexandria	VA	4.4	1.7	3.9	112.8
Arlington	VA	10.4	3.8	5.8	179.3
Clarke	VA	0.1	*	0.4	25.0
Culpeper	VA	0.2	0.1	0.7	28.6
Fairfax	VA	23.7	6.6	3.4	697.1
Fairfax City	VA	0.6	0.2	2.0	30.0
Falls Church	VA	0.3	0.1	3.4	8.8
Fauquier	VA	0.3	0.1	0.7	42.9
Frederick	VA	0.1	*	0.4	25.0
Fredericksburg	VA	0.1	*	0.8	12.5
King George	VA	0.1	*	0.7	14.3
Loudoun	VA	1.1	0.3	1.5	73.3
Manassas City	VA	0.2	0.1	1.3	15.4
Manassas Park	VA	0.1	*	1.5	6.7
Page	VA	0.1	*	0.6	16.7
Prince William	VA	4.0	0.9	2.2	181.8
Rappahannock	VA	0.1	*	0.9	11.1
Shenandoah	VA	0.2	0.1	0.7	28.6
Spotsylvania	VA	0.4	0.1	0.9	44.4
Stafford	VA	0.6	0.1	1.2	50.0

Continued . . .

WASHINGTON D.C.
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

(Continued)

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Warren	VA	0.2	0.1	0.9%	22.2
Westmoreland	VA	0.1	*	0.8	12.5
Winchester	VA	0.1	*	0.6	16.7
Berkeley	WV	0.4	0.1	0.7	57.1
Hampshire	WV	0.1	*	0.4	25.0
Jefferson	WV	0.3	0.1	0.8	37.5
Mineral	WV	0.1	*	0.3	33.3
Morgan	WV	0.1	*	0.4	25.0
TOTAL		114.4	35.2	2.5%	4,588.7

* Designates a population or household figure of less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Households headed by persons of Hispanic origin or descent in the Washington, D.C. ADI total 35,200. The counties of Montgomery, Fairfax and the District of Columbia account for the highest number of these households. Specifically, there are 7,800 households in Montgomery County headed by Hispanics, there are 6,600 in Fairfax County and 6,500 in the District of Columbia. Together, these three counties account for 59% of all Hispanic households.

3. Age/Sex Of The Population

Approximately 32.7% of the Hispanic population is under the age of 18, while 35.5% of the Hispanic population is between the ages of 18 and 34. These figures show that 78,000 of the 114,400 Hispanic persons in this ADI are under the age of 35.

WASHINGTON D.C.
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	20.0		17.5%	
Males 35 - 49	9.5		8.3	
Males 50 - 64	5.3		4.6	
Males 65+	2.7		2.4	
Males 18+		**37.5**		**32.8%**
Females 18 - 34	20.6		18.0	
Females 35 - 49	10.3		9.0	
Females 50 - 64	5.7		5.0	
Females 65+	2.9		2.5	
Females 18+		**39.5**		**34.5**
Teens (12 - 17)		**12.7**		**11.1**
Children (0 - 11)		**24.7**		**21.6**
TOTAL		**114.4**		**100.0%**

Source: Strategy Research Corporation

Adult men represent 32.8% of the Hispanics, compared with 34.5% for Hispanic adult women.

4. Country Of Origin

The Washington D.C. Hispanic Market is formed of diverse Hispanic groups. No one group severely dominates in this market. Roughly 16% are Mexican, 10% are Puerto Rican and 8% are Cuban.

MARKET - 28

EL CENTRO/YUMA

1. Hispanic Population

The El Centro/Yuma ADI is comprised of two counties: Yuma (Arizona) and Imperial (California).

The 1987 estimated Hispanic population for this market is 101,600 persons, an increase of 9.5% over 1985's Hispanic total.

In the seven year period, 1980-1987, the Hispanic population increased by 30.3%, or 23,600 new Hispanic residents.

EL CENTRO/YUMA
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Yuma	AZ	10.6	26.6	30.3	30.9
Imperial	CA	25.3	51.4	62.5	70.7
TOTAL		35.9	78.0	92.8	101.6

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The City of El Centro, located in Imperial County, has a population base of more than 50% Hispanics.

2. Hispanic Population/Households - Total Population

There are presently 24,500 households in the El Centro/Yuma ADI which are headed by persons of Hispanic origin. Seventeen thousand of these are located in Imperial County.

EL CENTRO/YUMA
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Yuma	AZ	30.9	7.6	30.4%	101.6
Imperial	CA	70.7	16.9	57.6	122.7
TOTAL		101.6	24.5	45.3%	224.3

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Hispanics represent approximately 45% of the ADI's total population of 224,300 persons.

3. Age/Sex Of The Population

The El Centro/Yuma Hispanic Market is a "young" market with 44.6% of the population under 18 years of age and 72.5% under 35 years of age.

EL CENTRO/YUMA
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	14.0		13.8%	
Males 35 - 49	7.2		7.1	
Males 50 - 64	4.1		4.0	
Males 65+	2.0		2.0	
Males 18+		**27.3**		**26.9%**
Females 18 - 34	14.3		14.1	
Females 35 - 49	8.3		8.2	
Females 50 - 64	4.2		4.1	
Females 65+	2.2		2.2	
Females 18+		**29.0**		**28.5**
Teens (12 - 17)		**14.3**		**14.1**
Children (0 - 11)		**31.0**		**30.5**
TOTAL		**101.6**		**100.0%**

Source: Strategy Research Corporation

The Hispanic adult male/female ratio is relatively even, with 26.9% of the population consisting of males and 28.5% consisting of females.

4. Country Of Origin

In the El Centro/Yuma Market, slightly more than nine out of ten Hispanics are of Mexican descent.

MARKET - 29

BAKERSFIELD

1. Hispanic Population

In 1987 the Bakersfield, California Market will be the home for approximately 100,600 Hispanics. This represents an increase of 9,100 persons since 1985 when the Bakersfield ADI's Hispanic population stood at 91,500.

BAKERSFIELD
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Kern West	CA	49.8	87.0	91.5	100.6
TOTAL		49.8	87.0	91.5	100.6

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The Hispanic population has grown by nearly 16% since the 1980 U.S. Census and has almost doubled since 1970.

2. Hispanic Population/Households - Total Population

The Bakersfield ADI, which is comprised of Kern West County, has a Hispanic population equivalent to over one-fifth (23.7%) of the total population base.

BAKERSFIELD
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Kern West	CA	100.6	25.2	23.7%	424.5
TOTAL		100.6	25.2	23.7%	424.5

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

There are approximately 25,200 households in Kern West County headed by persons of Hispanic origin or descent.

3. Age/Sex Of The Population

Adults over the age of 49 comprise only 13% of this young Hispanic market.

BAKERSFIELD
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	14.9		14.8%	
Males 35 - 49	7.1		7.1	
Males 50 - 64	4.6		4.6	
Males 65+	2.1		2.1	
Males 18+		**28.7**		**28.5%**
Females 18 - 34	14.6		14.5	
Females 35 - 49	7.0		7.0	
Females 50 - 64	4.3		4.3	
Females 65+	2.0		2.0	
Females 18+		**27.9**		**27.7**
Teens (12 - 17)		**14.5**		**14.4**
Children (0 - 11)		**29.5**		**29.3**
TOTAL		**100.6**		**100.0%**

Source: Strategy Research Corporation

Approximately 73% of all Hispanics residing in the Bakersfield Market are under 35 years of age, with 44% under the age of 18.

4. Country Of Origin

Typical of other southwestern markets, the Bakersfield Market is comprised mostly of Mexican-Americans. That is, at least nine out of every ten Hispanics in this California market is of Mexican origin or descent.

5. Language Spoken At Home

In Bakersfield, approximately six out of ten Hispanics speak Spanish in their home.

MARKET - 30

COLORADO SPRINGS/PUEBLO

1. Hispanic Population

The Colorado Springs/Pueblo ADI is comprised of approximately 97,300 Hispanics, thus ranking it the 30th largest Hispanic populated market in the U.S.

From 1970 to 1987, the Market's Hispanic population increased by 54% with an addition of 34,300 Hispanic persons.

The 1985 to 1987 period shows an increase of 1,800 new Hispanic residents to the Market area.

COLORADO SPRINGS/PUEBLO
HISPANIC POPULATION
1970, 1980, 1985, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000
Baca	CO	0.2	0.3	0.4	0.5
Bent	CO	0.9	1.5	1.6	1.7
Cheyenne	CO	0.5	0.1	0.1	0.1
Crowley	CO	0.5	0.6	0.6	0.6
Custer	CO	0.0	0.0	*	*
El Paso	CO	13.3	25.0	27.6	28.5
Fremont	CO	1.3	2.3	2.5	2.6
Hinsdale	CO	*	*	NA	NA
Huerfano	CO	2.6	2.8	2.9	3.0
Kiowa	CO	*	0.0	0.0	*
Las Animas	CO	5.9	6.5	6.7	6.8
Lincoln	CO	*	0.0	NA	NA
Mineral	CO	0.0	0.0	NA	NA
Otero	CO	6.3	7.5	7.6	7.6
Prowers	CO	1.8	2.6	NA	NA
Pueblo	CO	29.7	41.6	43.9	44.3
Saguache	CO	NA	NA	1.6	1.6
Teller	CO	*	0.1	NA	NA
TOTAL		63.0	90.9	95.5	97.3

NA = Not Applicable

* Designates a Hispanic population of less than 100 persons.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

With regard to density, roughly 72,800 of the Hispanic residents of this Market are located in the adjoining counties of El Paso and Pueblo. The former accounts for 28,500 Hispanics and the latter for 44,300 Hispanics.

2. Hispanic Population/Households - Total Population

A total of 594,100 persons reside within the Colorado Springs/Pueblo ADI. As 97,300 Hispanics make this market area their home, they represent 16.4% of the total population base.

COLORADO SPRINGS/PUEBLO
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	1987 Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Baca	CO	0.5	0.2	5.9%	8.5
Bent	CO	1.7	0.5	25.8	6.6
Cheyenne	CO	0.1	*	2.4	4.2
Crowley	CO	0.6	0.2	20.0	3.0
Custer	CO	*	*	2.4	2.1
El Paso	CO	28.5	7.9	8.2	347.6
Fremont	CO	2.6	0.6	8.0	32.5
Huerfano	CO	3.0	1.0	43.5	6.9
Kiowa	CO	*	*	2.1	1.9
Las Animas	CO	6.8	2.4	43.6	15.6
Otero	CO	7.6	2.3	33.0	23.0
Pueblo	CO	44.3	12.3	33.1	133.8
Saguache	CO	1.6	0.5	19.0	8.4
TOTAL		97.3	27.9	16.4%	594.1

* Designates a population or household figure of less than 100 persons.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

There are a total of 27,900 Hispanic households situated within this Colorado ADI. Thus, the average number of persons per Hispanic household registers at 3.5.

3. Age/Sex Of The Population

Adult men comprise 30.7% of the Colorado Springs/Pueblo ADI's Hispanics, while adult women constitute 29.0%.

COLORADO SPRINGS/PUEBLO
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	16.3		16.7%	
Males 35 - 49	7.2		7.4	
Males 50 - 64	4.2		4.3	
Males 65+	2.2		2.3	
Males 18+		**29.9**		**30.7%**
Females 18 - 34	13.8		14.2	
Females 35 - 49	7.5		7.7	
Females 50 - 64	4.6		4.7	
Females 65+	2.4		2.5	
Females 18+		**28.3**		**29.1**
Teens (12 - 17)		**14.0**		**14.4**
Children (0 - 11)		**25.2**		**25.9**
TOTAL		**97.4**		**100.0%**

Source: Strategy Research Corporation

Typical of the U.S. Hispanic market, the Colorado Springs/Pueblo Hispanic community is very young. Approximately 71% are under 35 years of age, while children and teenagers account for 40.3% of the population.

4. Country Of Origin

The Colorado Springs/Pueblo area Hispanics are predominantly of Mexican origin or descent.

MARKET - 31

SANTA BARBARA/SANTA MARIA/SAN LUIS OBISPO

1. Hispanic Population

This Southern California ADI, which lies just above Los Angeles, currently is the home for 94,200 Hispanic persons, an increase of 24,000 Spanish-speaking persons since 1980. Thus, we see an increase in the number of Hispanic persons in the area of 34% from the 1980 Hispanic population total of 70,200.

SANTA BARBARA/SANTA MARIA/SAN LUIS OBISPO
HISPANIC POPULATION
1980, 1985, 1987

County	State	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
San Luis Obispo	CA	14.8	18.2	21.4
Santa Barbara	CA	55.4	65.2	72.8
TOTAL		70.2	83.4	94.2

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

In terms of density, about 77% or 72,800 of these Hispanic persons take residence in Santa Barbara County, which has experienced a growth in the number of Hispanics of approximately 12% since 1985.

San Luis Obispo County accounts for 21,400 Spanish-speaking persons (6,600 more than in 1980).

2. Hispanic Population/Households - Total Population

With a Hispanic population of 94,200 and a total population of 536,300, the Santa Barbara/Santa Maria/San Luis Obispo ADI is 17.6% Hispanic.

SANTA BARBARA/SANTA MARIA/SAN LUIS OBISPO
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
San Luis Obispo	CA	21.4	5.6	11.0%	194.5
Santa Barbara	CA	72.8	20.2	21.3	341.8
TOTAL		94.2	25.8	17.6%	536.3

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

San Luis Obispo County is 11.0% Spanish with 21,400 Hispanics and 173,100 non-Hispanics.

Although 77% of the ADI's Hispanic population resides in Santa Barbara County, the county itself is only 21.3% Hispanic (72,800 Hispanic population, 341,800 total population).

3. Age/Sex Of The Population

There are approximately the same number of adult Hispanic males as there are females in the Santa Barbara/Santa Maria/San Luis Obispo Market, each representing approximately 32% of the area's total Hispanic population.

SANTA BARBARA/SANTA MARIA/SAN LUIS OBISPO HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	16.3		17.3%	
Males 35 - 49	7.0		7.4	
Males 50 - 64	4.7		5.0	
Males 65+	2.5		2.7	
Males 18+		**30.5**		**32.4%**
Females 18 - 34	14.8		15.7	
Females 35 - 49	7.2		7.6	
Females 50 - 64	5.2		5.5	
Females 65+	2.9		3.1	
Females 18+		**30.1**		**32.0**
Teens (12 - 17)		**12.1**		**12.8**
Children (0 - 11)		**21.5**		**22.8**
TOTAL		**94.2**		**100.0%**

Source: Strategy Research Corporation

Children under twelve represent slightly more than one-fifth (22.8%) of the Market's Hispanic population, while an additional 13% are between twelve and 17 years of age.

MARKET - 32

HARTFORD/NEW HAVEN

1. Hispanic Population

The Hartford/New Haven ADI is comprised of six counties: Hartford, Litchfield, Middlesex, New Haven, New London and Tolland, which contain a total of 93,400 Hispanic persons.

The Hispanic population in this Market has increased by 21% since 1980, from 77,300 in that year to the aforementioned 1987 figure of 93,400.

HARTFORD/NEW HAVEN
HISPANIC POPULATION
1987

County	State	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Hartford	CT	41.4	49.2	50.4
Litchfield	CT	1.1	1.2	1.3
Middlesex	CT	1.8	2.1	2.2
New Haven	CT	27.3	31.7	32.9
New London	CT	4.7	5.3	5.4
Tolland	CT	1.0	1.1	1.2
TOTAL		77.3	90.6	93.4

Source: U.S. Department of Commerce
Bureau of Census
Strategy Research Corporation

Hartford County is home for 50,400 Spanish-speaking persons, while an additional 32,900 live in New Haven County. Both have increased by approximately 21% in number of Hispanic persons since 1980.

2. Hispanic Population/Households - Total Population

Four percent of the Hartford/New Haven ADI is Hispanic (93,400 Hispanic population/2,396,900 total population).

Although 54% of the Hispanic population is concentrated in Hartford County, Hispanics comprise only 5.6% of the county's total population base.

Similarly, New Haven County accounts for the second highest population count overall (32,900 Hispanics/783,300 total population) yet, Hispanics comprise only 4.2% of the total.

HARTFORD/NEW HAVEN
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Hartford	CT	50.4	14.4	5.6%	900.0
Litchfield	CT	1.3	0.4	0.7	185.7
Middlesex	CT	2.2	0.6	1.6	137.5
New Haven	CT	32.9	9.6	4.2	783.3
New London	CT	5.4	1.5	2.1	257.1
Tolland	CT	1.2	0.3	0.9	133.3
TOTAL		93.4	26.8	3.9%	2,396.9

Source: U.S. Department of Commerce
Bureau of Census
Strategy Research Corporation

There are presently 26,800 households in the Hartford/New Haven ADI which are headed by persons of Hispanic origin/descent. A total of 14,400 of these households are located in Hartford County, while 9,600 are located in New Haven County.

Overall, there are an average of 3.5 members per Hispanic household in this northeastern ADI.

3. Age/Sex Of The Population

The Hispanic population of the Hartford/New Haven ADI can be considered young; 37.7% are under the age of 18, while 72.9% are 34 years of age or younger.

HARTFORD/NEW HAVEN
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	16.0		17.1%	
Males 35 - 49	7.1		7.6	
Males 50 - 64	2.9		3.1	
Males 65+	1.5		1.6	
Males 18+		**27.5**		**29.4%**
Females 18 - 34	16.9		18.1	
Females 35 - 49	8.0		8.6	
Females 50 - 64	3.8		4.1	
Females 65+	2.0		2.1	
Females 18+		**30.7**		**32.9**
Teens (12 - 17)		**11.1**		**11.9**
Children (0 - 11)		**24.1**		**25.8**
TOTAL		**93.4**		**100.0%**

Source: Strategy Research Corporation

Males (18+) account for 29.4% of the Hispanic population, while females (18+) account for 32.9% of the total.

DETROIT

1. Hispanic Population

A total of 86,600 Spanish-speaking persons currently reside in the Detroit ADI, 50,000 of whom take residence in Wayne County. An additional 16,400 live in Oakland County, and these two counties comprise over three quarters of the Detroit Market's total Hispanic population.

DETROIT
HISPANIC POPULATION
1970, 1980, 1987

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)	1987 Hispanic Population (000)
Lapeer	MI	0.8	1.3	1.5	1.6
Livingston	MI	0.5	0.8	0.9	0.9
Macomb	MI	5.0	6.6	7.1	7.3
Monroe	MI	1.8	1.8	1.9	2.0
Oakland	MI	10.0	14.5	16.2	16.4
Sanilac	MI	NA	NA	0.9	1.0
St. Clair	MI	1.2	2.1	2.5	2.6
Washtenaw	MI	2.3	4.1	4.7	4.8
Wayne	MI	40.0	46.3	48.4	50.0
TOTAL		61.6	77.5	84.1	86.6

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Overall, Hispanic population increased by 12% (9,100 persons) since 1980.

2. Hispanic Population/Households - Total Population

The current estimate of the total population of the Detroit ADI is 5,009,000 persons. As 86,600 persons of Hispanic origin live within the ADI, the area is 14.3% Hispanic.

DETROIT
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
1987

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Lapeer	MI	1.6	0.4	2.0%	80.0
Livingston	MI	0.9	0.2	0.8	112.5
Macomb	MI	7.3	2.1	1.0	730.0
Monroe	MI	2.0	0.5	1.5	133.3
Oakland	MI	16.4	4.7	1.6	1,025.0
St. Clair	MI	2.6	0.7	1.4	185.7
Sanilac	MI	1.0	0.3	2.4	41.5
Washtenaw	MI	4.8	1.5	1.5	320.0
Wayne	MI	50.0	14.7	2.1	2,381.0
TOTAL		86.6	25.1	14.3%	5,009.0

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The largest county in terms of number of Hispanics in the ADI is Wayne County, with 50,000 total Hispanics located there. Overall, a total of 2,381,000 persons live in Wayne County, making the county only 2.1% Hispanic.

3. Age/Sex Of The Population

About 37.7% of Detroit's Hispanics are teens or children under the age of 18, while 72.2% are 34 years of age or younger.

DETROIT
HISPANIC AGE/SEX DISTRIBUTION
1987

	Hispanic Population (000)		Percent Distribution	
Males 18 - 34	15.4		17.8%	
Males 35 - 49	6.9		8.0	
Males 50 - 64	3.3		3.8	
Males 65+	1.7		2.0	
Males 18+		**27.3**		**31.5%**
Females 18 - 34	14.5		16.7	
Females 35 - 49	7.2		8.3	
Females 50 - 64	3.2		3.7	
Females 65+	1.7		2.0	
Females 18+		**26.6**		**30.7**
Teens (12 - 17)		**10.4**		**12.0**
Children (0 - 11)		**22.3**		**25.8**
TOTAL		**86.6**		**100.0%**

Source: Strategy Research Corporation

In terms of male/female distribution, the proportion of Hispanic adults in the Detroit ADI are about equal (27,300 males/26,600 females).

B. UNITED STATES/MEXICO BORDER MARKETS

An estimated 2.5 million Hispanic persons live immediately south of the U.S./Mexico border. Five major "twin city" markets are situated adjacent to each other. Namely, El Centro/Yuma/Mexicali, El Paso/Ciudad Juarez, Laredo/Nuevo Laredo, McAllen/Brownsville/Matamoros, and San Diego/Tijuana. These "sister cities" depict a total Hispanic population of almost 4.2 million persons — approximately 2.5 million in the Mexico markets and 1.7 million in the U.S. ADIs.

1987
HISPANIC POPULATION
U.S./MEXICO BORDER MARKETS

Market	Number of Hispanic Persons	
El Centro/Yuma ADI	101,600	
Mexicali, Mexico	400,000	
El Centro/Yuma/Mexicali		501,600
El Paso ADI	477,900	
Ciudad Juarez, Mexico	688,800	
El Paso/Ciudad Juarez		1,166,700
Laredo ADI	131,900	
Nuevo Laredo, Mexico	310,000	
Laredo/Nuevo Laredo		441,900
McAllen/Brownsville ADI	588,300	
Matamoros, Mexico	250,000	
McAllen/Brownsville/Matamoros		838,300
San Diego ADI	381,400	
Tijuana, Mexico	864,400	
San Diego/Tijuana		1,245,800

Source: Mexican Government Census Bureau
Strategy Research Corporation

Both the U.S. and Mexican markets are within close proximity to one another and travel between the "sister cities" is constant. Laredo, Texas and Nuevo Laredo, Mexico, for example, are immediately adjacent to one another; separated by the Rio Grande. Travel between the two markets is constant, and many of the Mexican citizens shop and work on the U.S. side of the border. Similarly, Ciudad Juarez borders directly on El Paso's central business district. Approximately one-third of all dollars spent in El Paso's downtown retail outlets comes from these border market consumers. Commonly referred to as "border commuters," it is difficult to quantify their exact numbers. However, a look at some consumer spending indicators hint at their impact. For example, in 1986, in the Laredo, Texas Metro area, residents have an estimated aggregate consumer spendable income of $939 million. For this same period, the market's Total Retail Sales are an estimated $1 billion! Obviously, substantial dollars are being spent in the market by non-residents.

Laredo ranks 315th among all U.S. metro markets for total Effective Buying Income (EBI), and 266th for Total Retail Sales; yet, the market ranks fifth with regard to total Retail Sales per household.

The metro market of McAllen/Edenburg/Mission ranks 195th in total Effective Buying Income and 146th for Per Household Retail Sales.

1986
METRO AREA RANKINGS
U.S. METRO AREAS ONLY

	Brownsville/ Harlingen SMSA	El Paso SMSA	Laredo SMSA	McAllen Edenburg/ Mission SMSA
Population	153	86	278	125
Households	189	96	310	160
Effective Buying Income (EBI)	208	110	315	195
Average Household EBI	287	253	313	315
Total Retail Sales	191	98	266	158
Per Household Retail Sales	205	159	5	146
Food Store Sales	182	104	264	141
General Merchandise Store Sales	161	88	208	128
Department Store Sales	178	88	222	139
Apparel & Accessories Store Sales	172	83	151	86

Continued. . .

METRO AREA RANKINGS
U.S. METRO AREAS ONLY
(Continued)

	Brownsville/ Harlingen SMSA	El Paso SMSA	Laredo SMSA	McAllen Edenburg/ Mission SMSA
Furniture/Home Furnishings/ Appliance Store Sales	137	65	187	146
Automotive Dealer Sales	233	90	307	177
Gasoline Service Station Sales	264	[illegible]4	268	212
Drugstore Sales	291	105	292	216

Source: Survey of Buying Power Data Service

Although the exact number of dollars expended on each side of the border is somewhat difficult to determine, the fact remains that Mexican consumers are easily reached through U.S. advertising, as many are bilingual and subscribe to U.S. publications. Newspaper and radio are the most efficient and cost effective means of reaching Mexicans along the border. Furthermore, the constant border traffic reinforces ties with the homeland for Hispanic residents on the U.S. side, thereby helping to stimulate consumption of Spanish media. In sum, Mexicans living on the border are a viable market for advertisers.

In Section VI, Sub-section A of this Report, a table is presented which lists the top 33 Hispanic ADIs. The following table presents this data, however, with the population of the U.S./Mexico "sister" markets included.

The impact of the additional Mexican citizen population in the U.S./Mexican border markets is apparent as three of these five border markets now rank in the top ten.

1987
TOP 33 HISPANIC MARKETS
INCLUDING U.S./MEXICO BORDER MARKETS

Rank	Market	Hispanic Population (000)
1	Los Angeles ADI	3,614.0
2	New York ADI	2,495.6
3	San Diego ADI/Tijuana, Mexico	1,245.8
4	El Paso ADI/Ciudad Juarez, Mexico	1,166.7
5	Miami ADI	936.2
6	San Antonio ADI	889.3
7	McAllen/Brownsville ADI/Matamoros, Mexico	838.3
8	San Francisco ADI	786.9
9	Chicago ADI	753.7
10	Houston ADI	706.5
11	El Centro/Yuma ADI/Mexicali, Mexico	501.6
12	Albuquerque	451.3
13	Laredo ADI/Nuevo Laredo, Mexico	441.9
14	Fresno ADI	410.3
15	Dallas/Ft. Worth ADI	383.7
16	Phoenix ADI	349.3
17	Sacramento/Stockton ADI	344.5
18	Corpus Christi ADI	340.9
19	Denver ADI	260.3
20	Philadelphia ADI	231.1
21	Tucson ADI	208.4
22	Austin ADI	170.8
23	Salinas/Monterey ADI	165.1
24	Tampa/St. Petersburg ADI	140.3
25	Boston ADI	134.1
26	Odessa/Midland ADI	129.3
27	Lubbock ADI	124.0
28	Washington, D.C. ADI	114.4
29	Bakersfield ADI	100.6
30	Colorado Springs/Pueblo ADI	97.3
31	Santa Barbara/Santa Maria/ San Luis Obispo ADI	94.2
32	Hartford/New Haven ADI	93.4
33	Detroit ADI	86.6

Source: Mexican Government Census Bureau
Strategy Research Corporation

C. ADDITIONAL HISPANIC COUNTIES

The following table lists additional counties not covered by the 33 major Hispanic ADI's, but which have Hispanic populations of 10,000 or more.

ADDITIONAL COUNTIES WITH HISPANIC POPULATIONS OF 10,000 OR MORE

State/County	Hispanic Population (000)	ADI
Arizona		
Coconino	10.1	Flagstaff
Florida		
Collier	14.6	Ft. Myers
Duval	12.5	Jacksonville
Orange	25.8	Orlando
Palm Beach	41.4	West Palm Beach
Hawaii		
Hawaii	11.0	Honolulu
Honolulu	65.2	Honolulu
Kansas		
Sedgwick	12.9	Wichita
Louisiana		
Jefferson	23.3	New Orleans
Orleans	19.2	New Orleans
Massachusetts		
Bristol	11.9	Providence
Hampden	24.6	Springfield, Mass.
Michigan		
Ingham	12.1	Lansing
Kent	10.4	Grand Rapids
Saginaw	13.8	Flint - Saginaw - Bay City
Missouri		
Jackson	17.1	Kansas City

Continued. . .

ADDITIONAL COUNTIES WITH HISPANIC POPULATIONS OF 10,000 OR MORE
(Continued)

State/County	Hispanic Population (000)	ADI
Nevada		
Clark	45.0	Las Vegas
Washoe	11.2	Reno
New Mexico		
Chaves	20.7	Roswell
Eddy	18.4	Roswell
San Juan	13.4	Farmington
New York		
Erie	15.7	Buffalo
Monroe	19.4	Rochester
North Carolina		
Cumberland	10.6	Raleigh
Ohio		
Cuyahoga	24.4	Cleveland
Lorain	13.7	Cleveland
Lucas	12.8	Toledo
Oklahoma		
Oklahoma	16.4	Oklahoma City
Oregon		
Marion	11.4	Portland
Multnomah	12.8	Portland
Pennsylvania		
Lancaster	10.7	Harrisburg
Rhode Island		
Providence	18.2	Providence

Continued. . .

ADDITIONAL COUNTIES WITH HISPANIC POPULATIONS OF 10,000 OR MORE
(Continued)

State/County	Hispanic Population (000)	ADI
Texas		
Brazos	13.7	Waco
Deaf Smith	10.3	Amarillo
Jefferson	12.4	Beaumont - Pt. Arthur
McLennan	19.4	Waco
Potter	14.7	Amarillo
Taylor	17.0	Abiline
Tom Green	24.3	San Angelo
Victoria	28.0	Victoria
Utah		
Salt Lake	35.7	Salt Lake City
Washington		
King	29.4	Seattle - Tacoma
Pierce	14.5	Seattle - Tacoma
Yakima	28.0	Yakima
Wisconsin		
Milwaukee	30.9	Milwaukee

Source: Strategy Research Corporation

VII. PUERTO RICO

VII. PUERTO RICO

A. BACKGROUND

On July 25, 1952, Puerto Rico became a commonwealth, voluntarily associated to the United States by means of a Compact approved by the voters of Puerto Rico. The Puerto Ricans wrote their own Constitution, which embodied a new type of political freedom, instituted a Bill of Rights and set forth a republican form of government. It abolished the last traces of colonialism and fulfilled a long historical desire for self-determination.

In November 1953, the United Nations passed a resolution recognizing the Commonwealth as a self-governing country. The Commonwealth is freely associated to the United States on the basis of common citizenship by means of the bilateral Compact.

The United States and the Commonwealth of Puerto Rico share common defense, market, and currency. The official languages of Puerto Rico are Spanish and English. The Commonwealth exercises virtually the same control over its internal affairs as do the fifty states.

As a Commonwealth of the United States, the economy of Puerto Rico is closely integrated with that of the U.S. Mainland. As well as being the source of the majority of Puerto Rico's imports, the United States receives more than three-fourths of the Island's exports.

Availability of labor and extensive government support, among other factors, have attracted many major U.S. and international corporations to establish operations in Puerto Rico. The tax laws are structured to encourage the export of local production. While this is an advantage during boom times in the United States, it makes Puerto Rico vulnerable to downturns in the U.S. economy.

B. THE PUERTO RICAN CONSUMER

Factors contributing to the Puerto Rican consumer's knowledge and sophistication is the traditional back-and-forth travel to the U.S. mainland. For decades, Puerto Ricans have left the Island to seek opportunity in the United States. Many return, bringing with them their stateside-acquired purchase habits. In addition, large numbers of Puerto Ricans travel to the U.S. for short periods of time; to visit family, to vacation, to study, or to join the Armed Forces.

This back-and-forth travel means consumers are exposed to new products, new ideas, and new ways of doing things. When they return to Puerto Rico, they import their preferences with them. By the same token, Puerto Ricans also export their preferences to the mainland.

C. POPULATION

The estimated population of the Island of Puerto Rico in 1987 is 3,383,800 persons. This reflects a gain of 187,300 over the 1980 Census figure of 3,196,500, or a percentage gain of 5.9%.

For Island-wide marketing purposes, Puerto Rico is divided into five marketing regions. These are identified by the major city in each region:

San Juan
Caguas
Ponce
Mayaguez
Arecido

The following table shows the population for 1970, 1980, 1985, and 1987, by each market region in Puerto Rico.

PUERTO RICO
POPULATION BY MARKETING REGION
1970, 1980, 1985, 1987

Marketing Region And Municipio	Population 1970 (000)	Population 1980 (000)	Population 1985 (000)	Population 1987 (000)	Percent Change 1970-1980	Percent Change 1980-1987
San Juan	906.1	1,042.5	1,081.8	1,099.2	15.1%	5.4%
Caguas	501.2	613.0	614.3	653.5	22.3	6.6
Ponce	502.1	576.4	577.5	590.4	14.8	2.4
Mayaguez	386.0	457.5	476.7	492.8	18.5	7.7
Arecibo	416.7	506.6	528.3	547.9	21.6	8.2
Total Puerto Rico	2,712.1	3,196.5	3,278.6	3,383.8	17.9%	5.9%

Source: U.S. Department of Commerce
Bureau of the Census
Planning Board - Puerto Rico
Strategy Research Corporation

The Caguas and Arecibo areas recorded the greatest percentage change in population from 1970 to 1980, and have continued to be centers of growth from 1980 to 1987.

VIII. RESIDENCY IN THE UNITED STATES

VIII. RESIDENCY IN THE UNITED STATES

This section reveals several factors regarding life in the United States among current U.S. Hispanic residents. Strategy Research Corporation queried respondents with regard to their length of residency in the United States; in addition, respondents were asked if they lived in some other country prior to establishing U.S. residency, and if so, what their reasons were for leaving their mother country.

All Hispanics were queried with regard to their feelings about life in the U.S., as well as about their past, present and future economic situations.

Participants stated their particular likes and dislikes about their lives in the U.S. In addition, they compared their present economic situation to that of five years ago; and they anticipated what their economic situation would be five years into the future.

A. LENGTH OF RESIDENCY

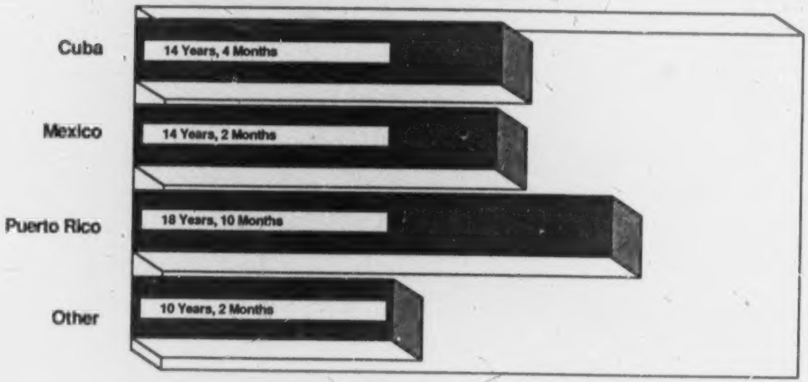
The length of time which various Hispanic-Americans have been living in the United States is presented in this sub-section.

1. By Market Region

The average length of residence of Hispanics in the United States is 14 years, one month. The percentage of Hispanics who have resided in the Southwest region of the country for 25 years or more (41.0%) is substantially higher than the percentage of Hispanics residing for the same length of time in other regions of the United States.

1987
U.S. Hispanic Market

Length of Time Living In The United States
By Country of Origin



Source: Strategy Research Corporation

1987
U.S. HISPANIC MARKET
LENGTH OF TIME LIVING IN THE UNITED STATES BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
6 Months Or Less	0.8%	0.3%	1.2%	0.5%	0.7%	1.3%
6 Months-1 Year	1.1	0.0	3.1	0.6	0.6	1.9
1 - 3 Years	6.5	5.3	5.2	4.7	5.4	8.2
3 - 5 Years	11.5	3.0	7.6	10.0	5.2	22.1
5 - 7 Years	9.4	7.2	17.9	5.0	2.8	14.8
7 - 8 Years	3.8	4.0	3.7	0.6	4.2	3.4
8 - 9 Years	3.4	2.4	1.6	3.6	2.7	4.5
9 - 10 Years	4.1	5.4	2.5	3.6	3.3	4.5
10 - 15 Years	12.6	14.1	7.0	14.9	12.1	13.6
15 - 20 Years	14.3	19.9	26.8	24.3	12.3	9.7
20 - 25 Years	8.6	12.0	18.0	11.3	9.7	4.1
25 Years Or More	23.6	26.4	5.4	20.9	41.0	11.9
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average Length Of Residency	14 Years 1 Month	16 Years 2 Months	13 Years 1 Month	15 Years 5 Months	17 Years 5 Months	10 Years 4 Months

Source: Strategy Research Corporation

Approximately one out of five Hispanics (22.1%) in the California region has resided in the United States for three to five years. This recent migration of Hispanics may be attributed to the increasing economic stress in Mexico and Latin America. Historically, California has been one of the preferred areas for immigrants seeking a better economic future.

The Southeast region has the highest percentage (17.9%) of Hispanics who have been living in the United States for over five years, but less than seven years. Factors such as the Mariel boatlift and the political unrest in Central America have contributed to this recent migration.

2. By Country Of Origin

Puerto Rican-Americans constitute the largest percentage (40.8%) of Hispanics residing in the United States for a period of 25 years or more.

The average length of residency in the United States for Puerto Rican-Americans is 18 years, 10 months; Cuban-Americans and Mexican-Americans follow closely, each with an average length of residency of slightly over fourteen years.

1987
U.S. HISPANIC MARKET
LENGTH OF TIME LIVING IN THE UNITED STATES
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
6 Months Or Less	0.9%	0.7%	0.7%	1.8%
6 Months-1 Year	0.6	1.2	0.3	1.9
1 - 3 Years	4.9	6.3	1.9	11.2
3 - 5 Years	4.9	12.4	1.8	19.2
5 - 7 Years	15.0	8.7	5.1	12.8
7 - 8 Years	5.8	3.6	1.6	5.0
8 - 9 Years	0.4	4.3	4.0	1.8
9 - 10 Years	0.7	4.3	2.4	6.2
10 - 15 Years	8.4	14.4	9.2	11.7
15 - 20 Years	35.3	10.3	19.0	14.2
20 - 25 Years	18.2	6.3	13.2	7.6
25 Years Or More	4.9	27.5	40.8	6.6
TOTAL	100.0%	100.0%	100.0%	100.0%
Average Length Of Residency	14 Years 4 Months	14 Years 2 Months	18 Years 10 Months	10 Years 2 Months

Source: Strategy Research Corporation

The majority of Cuban-Americans (53.5%) have been living in the United States for more than 15 years, but less than 25 years, as compared to 27.5% of Mexican-Americans who have been residing in the United States for 25 years or more.

In terms of Hispanics with different ancestry, 32.0% have been living in the U.S. for three to seven years.

B. PLACE OF PRIOR RESIDENCE

All survey participants were asked if they ever lived outside of the United States. If they affirmed residency elsewhere, they were subsequently asked from where they migrated.

1. Incidence Of Ever Having Lived Outside Of The United States

a. By Market Region

Three-fourths (75.4%) of the Hispanics surveyed mentioned that they had lived in another country prior to living in the United States.

1987
U.S. HISPANIC MARKET
INCIDENCE OF EVER LIVING OUTSIDE THE U.S.
BY MARKET REGION

	Total	North-East	South-East	Central	South-West	California
Yes	75.4%	79.4%	91.1%	74.6%	57.2%	86.1%
No	24.6	20.6	8.9	25.4	42.8	13.9
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

The Southeast region of the country shows the highest level of migration (91.9%), while the Southwest region registers the lowest level (57.2%)

b. By Country Of Origin

Cuban-Americans constitute the highest percentage (90.6%) of Hispanics having lived in another country prior to living in the United States. "Other" Hispanics, such as those from Central and South American countries, have the second highest incidence (84.1%) of having lived elsewhere before living in the United States.

1987
U.S. HISPANIC MARKET
INCIDENCE OF EVER LIVING OUTSIDE THE U.S.
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Yes	90.6%	70.4%	78.6%	84.1%
No	9.4	29.6	21.4	15.9
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Seventy percent of Hispanic-American from Mexico, as well as 78.6% of those of Puerto Rican origin have previously lived elsewhere, other than on the U.S. Mainland.

c. By Age

No considerable differences exist among age groups with regard to residency prior to the U.S.

1987
U.S. HISPANIC MARKET
INCIDENCE OF EVER LIVING OUTSIDE OF THE U.S.
BY AGE GROUP

	18-34	35-54	55+
Yes	76.0%	76.0%	72.4
No	24.0	24.0	27.6
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Hispanics less than 55 years of age, however, record a slightly higher degree of permanency; 76.0% have previously lived outside of U.S. boundaries.

2. Country Of Residency Prior To The United States

a. By Market Region

The majority of Hispanics currently living in the United States were previously residents of Mexico. Of all the Hispanics surveyed, 52.9% lived in Mexico before coming to the United States. Hispanics migrating from Mexico constitute the highest percentage now residing in the Southwest, California, and Central regions of the United States.

The greatest concentration of Hispanics migrating from Puerto Rico (59.5%) and the Dominican Republic (20.8%) are now residing in the Northeast region of the United States.

1987
U.S. HISPANIC MARKET
COUNTRY OF RESIDENCE
PRIOR TO THE UNITED STATES
BY MARKET REGION

	Total	North-East	South-East	Central	South-West	California
Mexico	52.9%	0.4%	1.7%	51.9%	88.2%	68.8%
Puerto Rico	14.6	59.5	3.3	45.1	0.2	0.6
Cuba	8.8	0.8	68.8	0.0	0.8	5.5
El Salvador	6.1	0.0	0.7	0.0	3.3	12.2
Dominican Republic	4.3	20.8	1.0	0.0	0.0	0.1
Nicaragua	2.7	1.2	8.7	0.0	0.4	3.7
Ecuador	1.8	6.9	0.7	3.0	0.0	0.6
Spain	1.2	0.7	5.2	0.0	0.4	1.2
Honduras	1.0	1.2	1.2	0.0	0.0	1.6
Other	6.6	8.5	8.7	0.0	6.7	5.7
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Although the factors affecting migration to the United States from a specific country are numerous and complex, similar situations do exist. Political changes within a country often trigger massive migrations to the United States. An example of such a migration is the Cuban migration. Sixty-nine percent of the Hispanics who reside in the Southeast region of the United States came from Cuba. The 8.7% of Hispanics who came from Nicaragua to the Southeast region of the United States were also greatly influenced by the political situation now present in their country.

b. By Age

The following table shows by age group, where Hispanics lived before residing in the United States.

1987
U.S. HISPANIC MARKET
COUNTRY OF RESIDENCE
PRIOR TO THE UNITED STATES
BY AGE GROUP

	18-34	35-54	55+
Mexico	55.5%	50.6%	49.7%
Puerto Rico	14.5	14.4	15.5
Cuba	5.6	8.0	19.8
El Salvador	8.0	5.7	0.8
Dominican Republic	4.0	3.7	6.4
Nicaragua	3.2	2.9	0.8
Ecuador	1.4	3.5	0.3
Spain	1.1	1.1	1.7
Honduras	0.3	2.7	0.0
Other	6.4	7.4	5.0
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

The only notable difference among the various age groups is among Hispanics having lived in Cuba prior to coming to this country. Twenty percent of all Hispanics coming from Cuba to the United States were 55 years of age or older.

C. REASONS FOR LEAVING COUNTRY OF PRIOR RESIDENCE

All Hispanics who stated that they previously lived outside of the continental United States were asked to state the reason(s) why they left their mother country.

1. By Market Region

Overall, the most cited reason for coming to the United States was attributed to economic purposes. Almost one-third (32.5%) of all Hispanics came to the U.S. seeking job opportunities. Economic/employment opportunities received the most mentions by Hispanics presently residing in the Central states (47.2%) followed by those in the Northeast (40.9%).

More than one-third of the Hispanics in the California area (35.8%) came to America seeking a better/new life. Overall, this reason was cited by one-fourth (25.5%) of all U.S. Hispanics.

1987
U.S. HISPANIC MARKET
REASONS FOR LEAVING COUNTRY OF PRIOR RESIDENCE
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
Economic/Find Work	32.5%	40.9%	5.9%	47.2%	22.7%	36.7%
Better/New Life	25.5	17.0	3.1	13.5	24.5	35.8
Family Reasons/ Decisions	21.6	38.8	14.6	32.3	22.9	13.2
Political Reasons /Get Away From Communism	13.7	2.4	70.7	0.0	4.0	14.0
Educational/ Go To School	4.1	6.7	0.0	3.5	7.5	1.7
Opportunity Available	4.0%	5.4%	0.0%	3.0%	9.2%	1.6%

Continued. . .

1987
U.S. HISPANIC MARKET
REASONS FOR LEAVING COUNTRY OF PRIOR RESIDENCE BY MARKET REGION
(Continued)

	Total	North-east	South-East	Central	South-west	California
Came Before/ Liked It/ Wanted To Return	1.2	1.6	0.4	5.5	1.4	0.6
Health Care/ Better Doctors	0.8	3.2	1.1	0.0	0.0	0.1
Other	0.7	0.0	4.0	0.0	0.5	0.5
No Particular Reason	6.9	2.8	0.2	5.6	14.0	6.7
TOTAL	*	*	*	*	*	*

* Multiple Response

Source: Strategy Research Corporation

Family-related reasons caused one-fifth (21.6%) of Hispanics to leave their country of birth to come to the U.S. This reason was cited most often by Spanish-speaking persons in the Northeast (38.8%) and Central regions (32.3%).

"Political Reasons/To Escape Communism was, by far, the predominant reason given by Hispanics in the Southeast region (70.7%).

Other reasons why Hispanics left their country of origin were to obtain a "Better Education/Go To School," "Health Care/Better Doctors," and for "General Opportunities" not available in their country.

2. By Country Of Origin

For three-fourths of the Cuban-Americans (76.4%), "Political Reasons/Escape From Communism" was the primary reason for coming to the United States. Fifteen percent also mentioned family-related reasons.

The relatively high response rate by Cubans for "Political Reasons" for the most part, substantiates their high concentration in the Southeast. Starting in 1959, political exiles from Cuba began to arrive in the United States, and Miami, due to its proximity to Cuba, became the primary port of entry for these exiles. As Castro's oppressive political and economic policies became effective, the flow of persons seeking freedom swelled, in spite of Castro's efforts to stop the out-migration. In 1980, the Southeast saw another strong increase in its Cuban population as a result of the boatlift from Mariel, Cuba.

One-third (33.3%) of the Mexicans decided to cross the border to live in the U.S. for "Economic Reasons" (Find Work)," while one-third (34.2%) stated that they came for a "Better/New Life."

1987
U.S. HISPANIC MARKET
REASONS FOR LEAVING COUNTRY OF PRIOR RESIDENCE BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Economic/Find Work	4.8%	33.3%	32.0%	43.4%
Better/New Life	1.7	34.2	13.9	23.0
Family Reasons/ Decisions	15.4	17.3	46.6	17.6
Political Reasons/ Get Away From Communism	76.4	3.4	1.3	19.3
Educational/Go To School	0.0	3.2	7.0	6.1
Opportunities Available	0.0	4.9	3.8	3.7
Came Before/Liked It/Wanted To Return	0.5	0.9	3.4	0.8
Health Care/Better Doctors	0.5	0.0	5.1	0.0
Other	3.0	0.6	0.0	0.3
No Particular Reason	1.2	10.6	4.0	2.2
TOTAL	*	*	*	*

* Multiple Response

Source: Strategy Research Corporation

The driving force among Puerto Ricans leaving Puerto Rico dealt with the "Family" (46.6%). Thirty-two percent also came to the U.S. mainland for "Employment Opportunities/Economic Reasons.

Similar to the Mexican immigrants, Puerto Ricans were farmers and laborers who came to the U.S. in search of opportunity.

3. By Age

The most attributable cause for coming to the United States by one-third of the Hispanics under 55 years of age was lack of work and the economic condition in their country; this reason was cited by 28.1% of the older Hispanics.

1987
U.S. HISPANIC MARKET
REASONS FOR LEAVING
COUNTRY OF PRIOR RESIDENCE
BY AGE GROUP

	18-34	35-54	55+
Economic/Find Work	33.1%	33.9%	28.1%
Better/New Life	25.2	26.4	25.0
Family Reasons/Decisions	22.6	21.2	19.2
Political Reasons/Get Away From Communism	9.3	14.8	25.0
Educational/Go To School	4.4	3.4	4.3
Opportunities Available	5.4	2.9	1.8
Came Before/Liked It/ Wanted To Return	1.7	0.9	0.3
Health Care/Better Doctors	0.3	0.5	2.9
Other	0.7	0.7	0.4
No Particular Reason	7.3	7.8	4.1
TOTAL	*	*	*

* Multiple Response

Source: Strategy Research Corporation

For one-fifth of the Hispanics 55 years of age and older, "Political Unrest/Communism" in their country was the underlying reason for their departure to the United States. This contributing factor was less prominent among younger Hispanics.

D. LIKES/DISLIKES ABOUT LIVING IN THE UNITED STATES

1. Degree Of Satisfaction

First, Hispanics were queried as to how much they liked living in the United States.

a. By Market Region

The levels of enthusiasm and disappointment vary among Hispanics in the different U.S. regions.

Overall, seven out of ten Hispanics like living in the United States "A Lot" (71.9%). With the inclusion of those who "Like It Somewhat," the level of satisfaction increases to 88.7%. This sentiment is highest in the Southeast United States (97.0%).

1987
U.S. HISPANIC MARKET
DEGREE OF SATISFACTION
LIVING IN THE UNITED STATES
BY MARKET REGION

	Total	North east	South-east	Central	South-west	California
Like It A Lot	71.9%	69.9%	89.9%	33.3%	82.4%	65.6%
Like It Somewhat	16.8	14.6	7.1	48.2	14.3	17.9
Dislike It A Little	9.3	12.7	1.4	16.1	2.8	13.7
Don't Like It At All	2.0	2.8	1.6	2.4	0.5	2.8
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Reasons for the high level of satisfaction is discussed later in this section.

b. By Country Of Origin

In general, Cuban-Americans are the Hispanics who feel most positive about living in the United States; 88.7% "Like It A Lot."

1987
U.S. HISPANIC MARKET
DEGREE OF SATISFACTION
LIVING IN THE UNITED STATES
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Like It A Lot	88.7%	73.1%	65.1%	65.4%
Like It Somewhat	6.3	17.2	21.2	17.7
Dislike It A Little	3.5	7.9	11.1	14.8
Don't Like It At All	1.5	1.8	2.6	2.1
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Seven out of ten Mexican-Americans (73.0%) enjoy life in the United States "A Lot," as do 65.1% of Puerto Ricans and 65.4% of the "Other" Hispanic-Americans.

c. By Age Group

In general, Hispanics of all age groups like living in the United States.

Hispanics 55 years of age and older are the most positive about life in the United States. Eight out of ten replied that they "Like It A Lot;" only 1.1% "Don't Like It At All."

1987
U.S. HISPANIC MARKET
DEGREE OF SATISFACTION
LIVING IN THE UNITED STATES
BY AGE GROUP

	18-34	35-54	55+
Like It A Lot	70.9%	69.2%	79.5%
Like It Somewhat	16.2	18.9	15.2
Like It A Little	10.9	9.6	4.2
Don't Like It At All	2.0	2.3	1.1
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

A total of 70.9% of Hispanics 18 to 34 like life in the U.S. "A Lot" and only 2.0% "Don't Like It At All."

Hispanics 35 to 54 years of age basically feel the same way the other age groups do about their present lifestyle — 69.2% commented that they liked living in the U.S. "A Lot," with an additional 18.9% liking it "Somewhat."

2. Reasons For Satisfaction/Dissatisfaction

Regardless of their level of satisfaction, all Hispanics were asked to state why they like or dislike life in the United States.

a. By Market Region

Most Hispanics like living in the U.S. because they feel there are "More Opportunities In General" (21.9%) and many also believe that the U.S. "Offers The Best System Of Life In The World" (18.5%).

Other positive reasons about living in the U.S. were that there are "More Jobs/Opportunities" (11.2%), that they were "Born Here/U.S. Native" (10.2%), and that the United States has the best system of government — "Freedom/Democracy/Safest Politically" (9.8%).

1987
U.S. HISPANIC MARKET
LIKES AND DISLIKES
ABOUT LIFE IN THE UNITED STATES
BY MARKET REGION

Positive Related	Total	North-east	South-east	Central	South-west	California
More Opportunities In General	21.9%	28.1%	20.5%	6.0%	25.1%	19.4%
Offers Best System Of Life In World	18.5	12.2	16.9	20.4	20.9	18.8
More Jobs/Opportunities	11.2	19.2	4.3	15.0	9.7	9.2
Born Here/U.S.A. Native	10.2	6.4	0.7	8.5	19.2	6.1
Freedom/Democracy/ Safest Politically	9.8	2.3	50.8	0.0	10.0	6.9
Grown To Love U.S.A./ My Second Home	4.9	9.0	6.4	7.6	1.5	5.0
Family Prefers/ Likes U.S.	4.7	10.2	0.6	13.4	3.2	2.9
Climate/Cleanliness	4.7	8.5	0.9	5.8	3.2	4.7
Best Country For Education	4.3%	5.0%	2.5%	4.7%	3.2%	5.2%
Raised/Grew Up Here	4.2	3.2	0.0	4.8	7.2	5.2
Different Lifestyle Environment	3.1	1.8	3.9	7.2	2.9	3.3
Hispanic Ambiance Can Keep Our Culture	1.9	3.5	2.5	1.2	0.4	2.3
Place/Fun/Entertain-Ment	1.6	1.7	0.0	6.0	2.6	0.7

Continued. . .

1987
U.S. HISPANIC MARKET
LIKES AND DISLIKES
ABOUT LIFE IN THE UNITED STATES
BY MARKET REGION
(continued)

Negative Related	Total	North-east	South-east	Central	South-west	California
Miss My Country/ Can't Fit In U.S.A.	4.3%	5.1%	1.2%	2.0%	1.8%	6.6%
Problems With Language/Can't Communicate	2.3	1.2	0.5	0.0	1.4	4.3
Can't Stand Crime/ Violence/Drugs	1.2	3.8	1.3	0.6	0.4	0.6
Bad Economics Here	0.5	0.0	0.6	0.0	0.0	0.8
Family Lives Elsewhere	0.4	0.0	0.0	3.4	0.8	0.0
Other	3.0	2.9	9.0	0.0	1.1	3.7
No Particular Reason	4.4	1.0	0.0	4.2	4.2	7.4
TOTAL	*	*	*	*	*	*

* Mutiple Response

Source: Strategy Research Corporation

The fact that there are "More Opportunities In General" is expressed most strongly by Hispanics residing in the Northeast (28.1%) and the Southwest (25.1%).

Hispanics in the Central and Southwestern United States, as well as in California strongly believe that this country "Offers The Best System Of Life In The World" (20.4%, 20.9%, and 18.8%, respectively).

More than half of the Hispanic-Americans living in the Southeast United States feel strongly about this country's democratic system: "Freedom/Democracy/Safest Politically" (50.8%).

Among Hispanics who do not like living in the United States, most of them gave the reason, "Miss My Country/Can't Fit In U.S.A." (4.3%); "Problems With Language/Can't Communicate" was also expressed as a dislike (2.3%).

Hispanics in the California area (6.6%) and in those in the Northeast region (5.1%) feel the most strongly about "Missing Their Country And Not Fitting In The U.S.A."

The factor dealing with "Family Prefers/Likes U.S." shows the strong emotional family ties Hispanics have. Ten percent of the Northeast Hispanics stated that they liked living in the U.S. because they like being with their family; this sentiment was also expressed by 13.4% of the Hispanics in the Central states.

Some Central region Hispanics feel negatively about living in America because their "Family Lives Elsewhere" (3.4%).

a few Southeast Hispanics feel negatively towards the United States due to the fact that they "Can't Stand Crime/Violence/Drugs" (1.3%). The second most mentioned negative-related reason given was "Miss My Country/Do Not Fit In The U.S.A." (1.2%).

b. By Country Of Origin

The likes and dislikes of Hispanic-Americans about life in the United States tend to vary by country of origin.

The majority of Cuban-Americans feel very positively about the United States' system of government "Freedom/Democracy/Safest Politically" (53.8%). This response is in line with the fact that the Cubans were forced out of their country for political reasons. Seventeen percent of the Cuban-Americans also made mention of the fact that the United States "Offers The Best System Of Life In The World."

"More Opportunities In General" and "Offers The Best System Of Life In The World" are the strongest positive-related factors about living in the United States expressed by the Mexican-American residents (22.0% and 21.9%, respectively).

1987
U.S. HISPANIC MARKET
LIKES AND DISLIKES ABOUT LIFE IN THE UNITED STATES BY COUNTRY OF ORIGIN

Positive Related	Cuba	Mexico	Puerto Rico	Other
More Opportunities In General	14.6%	22.0%	17.1%	28.7%
Offers Best System Of Life In World	17.0	21.9	9.0	16.5
More Jobs/Opportunities	1.8	10.4	19.7	11.8
Born Here/U.S.A. Native	0.6	12.9	10.6	4.3
Freedom/Democracy/ Safest Politically	53.8	6.9	0.3	6.6
Grown To Love U.S.A./My Second Home	14.5	2.3	11.2	3.8
Family Prefers/ Likes U.S.	0.5	2.8	14.8	4.5
Climate/Cleanliness	1.6	4.8	7.0	4.0
Best Country For Education	0.8	4.4	6.8	3.9
Raised/Grew Up Here	0.0	5.2	5.2	2.5
Different Lifestyle Environment	2.5	3.6	3.7	1.7
Hispanic Ambiance Can Keep Our Culture	3.8	1.4	5.1	0.4
Places/Fun/Entertainment	1.5	1.7	1.4	1.6

Continued. . .

1987
U.S. HISPANIC MARKET LIKES AND DISLIKES ABOUT LIFE IN THE UNITED STATES BY COUNTRY OF ORIGIN

(Continued)

Negative Related				
Miss My Country/ Can't Fit In U.S.A.	2.9%	3.4%	4.3%	7.6%
Problems With Language/Can't Communicate	0.4	2.4	0.7	3.8
Can't Stand Crime/ Violence/Drugs	1.2	0.5	5.0	0.6
Bad Economics Here	1.5	0.4	0.0	0.6
Family Lives Elsewhere	1.0	0.1	0.4	1.0
Other	6.6	2.9	1.5	2.7
No Particular Reason	0.0	4.7	0.7	7.7
TOTAL	*	*	*	*

* Multiple Response

Source: Strategy Research Corporation

Hispanic-Americans from places such as Central and South America cited "More Opportunities In General" most often when asked why they liked life in the U.S. (28.7%).

A total of 16.5% of Hispanics from countries other than Cuba, Mexico or Puerto Rico also feel that the U.S. "Offers The Best System Of Life In The World."

"More Job Opportunities" is what the Puerto Rican-Americans like most about living in the United States (19.7%). Family preference for the U.S. was given by 14.8% as their reason for liking the U.S.

c. By Age Group

The reasons expressed by Hispanics for their likes and dislikes of life in the U.S. were also compared by age groups.

The main positive related reason about living in the United States which was expressed by Hispanic-Americans 18 to 34 years of age and those 55 years of age and older is that there are "More Opportunities In General" in the United States (20.3% and 25.3%, respectively).

The positive reason expressed most often by Hispanics 35 to 55 years of age is that the U.S. "Offers The Best System Of Life In The World" (24.3%).

1987
U.S. HISPANIC MARKET
LIKES AND DISLIKES
ABOUT LIFE IN THE UNITED STATES
BY AGE GROUP

Positive Related	18-34	35-54	55+
More Opportunities In General	20.3%	22.6%	25.3%
Offers Best System Of Life In World	15.5	24.3	17.0
More Jobs/Opportunities	11.3	12.6	8.5
Born Here/U.S.A. Native	12.0	8.4	8.5
Freedom/Democracy/ Safest Politically	7.4	9.2	17.6
Grown To Love U.S.A./ My Second Home	2.7	3.4	13.6
Family Prefers/Likes U.S.	3.4	6.6	4.8
Climate/Cleanliness	4.4	6.7	1.8
Best Country For Education	4.2	5.3	2.9
Raised/Grew Up Here	6.6	1.8	1.9

Continued. . .

1987
U.S. HISPANIC MARKET
LIKES AND DISLIKES
ABOUT LIFE IN THE UNITED STATES
BY AGE GROUP
(Continued)

Positive Related	18-34	35-54	55+
Different Lifestyle Environment	3.8%	2.4%	2.3%
Hispanic Ambiance Can Keep Our Culture	2.0	2.3	1.0
Places/Fun/Entertainment	2.1	0.8	1.7
Negative Related			
Miss My Country/ Can't Fit In U.S.A.	4.9	3.8	3.3
Problems With Language/Can't Communicate	3.0	1.8	1.0
Can't Stand Crime/ Violence/Drugs	0.8	1.8	1.4
Bad Economics Here	0.1%	1.3%	0.0%
Family Lives Elsewhere	0.4	0.5	0.2
Other	3.4	2.5	2.6
No Particular Reason	4.4	4.1	5.2
TOTAL	*	*	*

* Multiple Response

Source: Strategy Research Corporation

"More Jobs/Opportunities" was given as a reason for liking like in the U.S. by 11.3% of the 18-to-34 year olds and 12.6% of the 35 to 54 year olds. Twelve percent of Hispanics under 34 years of age also feel positively about the United States' lifestyle because they were "Born Here/U.S.A. Native."

The two main reasons among Hispanics in all age groups for disliking life in the United States is that "I Miss My Country/Don't Fit In U.S.A.," and "Problems With Language/Can't Communicate."

E. DESIRED CHANGES/IMPROVEMENTS

Hispanics were also asked about the ways in which they would like to improve their way of life in the United States.

1. By Market Region

In general, there are two principal ways in which Hispanics presently residing in the United States would like to improve their lifestyle.

Three out of ten Hispanics (30.6%) wish to improve their current employment status. Twenty-eight percent also desire to see an overall improvement of their economic situation.

1987
U.S. HISPANIC MARKET
WAYS IN WHICH HISPANICS WANT TO
IMPROVE THEIR WAY OF LIFE IN THE U.S.
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
Be Employed/ Better Job	30.6%	35.3%	33.6%	27.7%	32.5%	27.6%
Improve Economic Situation In General	28.0	45.0	24.0	26.2	20.9	25.1
Improve English Language	7.9	9.1	1.8	7.0	8.5	
Content/Don't See Need For Improvement	7.9	3.9	13.3	4.2	8.0	9.4
To Own My Own Home	6.8	16.1	3.1	10.6	3.2	4.1

Continued. . .

1987
U.S. HISPANIC MARKET
WAYS IN WHICH HISPANICS WANT TO IMPROVE THEIR WAY OF LIFE IN THE U.S. BY MARKET REGION

(Continued)

	Total	North-East	South-East	Central	South-West	California
To Get An Education	5.3%	3.8%	1.9%	0.0%	5.2%	7.7%
Hispanics Need More Recognition/ Involvement/ In All Areas/ Politics	4.4	0.0	0.0	0.0	6.8	6.5
Reduction/ Crimes/Drugs/ Violence	4.1	7.0	1.8	9.0	3.6	3.0
Better Future/ Life For My Children	2.7	3.3	3.5	3.7	0.9	3.5
Better Relationships Between People	1.5	2.2	2.0	3.6	1.9	0.4
More Relaxed Lifestyle	1.5	0.6	2.9	0.6	1.4	1.7
Be Able To Bring Family To U.S.A.	1.2	0.9	5.9	3.5	0.7	0.4
Become A Permanent Resident	1.1	0.0	1.8	2.8	0.8	1.7
See Nation Get Better Overall	0.6	0.0	3.6	0.0	0.3	0.5

Continued. . .

1987
U.S. HISPANIC MARKET
WAYS IN WHICH HISPANICS WANT TO IMPROVE THEIR WAY OF LIFE IN THE U.S. BY MARKET REGION
(Continued)

	Total	North-East	South-East	Central	South-West	California
Maintain Tradition/ Culture	0.1%	0.0%	0.0%	0.0%	0.2%	0.0%
Other	1.9	2.1	5.1	2.6	1.6	1.5
Don't Know	12.2	6.2	4.7	13.8	18.2	12.2
TOTAL	*	*	*	*	*	*

* Multiple Response

Source: Strategy Research Corporation

Hispanics residing in the Northeast region of the United States exhibit a stronger desire to improve their employment and economic situations than Hispanics residing in other regions of the country.

Hispanics residing in the Southeast region of the country are more content with their present way of life in the United States than Hispanics residing elsewhere. Thirteen percent of all Hispanics living in the Southeast do not see a need for improvement in their current way of life.

Recognition and more involvement in political areas are a desired factors for improvement that Hispanic-Americans in California and the Southwest region of the United States consider important. In comparison, Hispanic-Americans residing in the Northeast, Southeast, and Central regions of the country do not mention political recognition and involvement as areas for improvement.

A total of 9.1% of the Hispanics currently residing in the Northeast, as well as 9.7% of those in the Southeast, would like to improve their English language skills. A similar response was rendered by 8.5% of the Hispanics in the California area; 7.0% of the Hispanics in the Southwestern states would also like to improve their proficiency in the English language.

Six percent of the Hispanic-Americans currently living in the Southeast region of the U.S. would like to be able to bring their family to this country.

2. By Country Of Origin

The following table compares ways in which Hispanics of different origins want to improve their lives. The desire for "Employment/Better Job Opportunity" is one improvement that Hispanics of all nationalities share.

Although Hispanics in general wish to improve their economic situation, a higher percentage Puerto Rican-Americans (48.4%) exhibit this desire than all other Hispanics. Eighteen percent of all Puerto Ricans also wish to own their own home. This percentage is considerably higher than that of Cuban, Mexican, and Other Hispanic-American who wish to own their own homes (2.3%, 4.3% and 8.0%, respectively).

1987
U.S. HISPANIC MARKET
WAYS IN WHICH HISPANICS WANT TO
IMPROVE THEIR WAY OF LIFE IN THE U.S.
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Be Employed/ Better Job	29.0%	29.4%	32.0%	34.4%
Improve Economic Situation In General	23.7	24.4	48.4	26.0
Improve English Language	10.0	7.5	3.1	11.9
Content/Don't See Need For Improvement	23.0	8.0	4.1	4.6
To Own My Own Home	2.3	4.3	18.1	8.0
To Get An Education	1.4	6.1	4.3	5.5
Hispanics Need/More Recognition/ Involvement In All Areas/Politics	0.0	6.8	0.0	2.7
Reduction/Crimes/ Drugs/Violence	1.4	4.1	5.6	3.6
Better Future/Life For My Children	1.1	2.2	3.8	4.2

Continued. . .

1987
U.S. HISPANIC MARKET
WAYS IN WHICH HISPANICS WANT TO IMPROVE THEIR WAY OF LIFE IN THE U.S. BY COUNTRY OF ORIGIN

(Continued)

	Cuba	Mexico	Puerto Rico	Other
Better Relationship Between People	1.8	0.9	2.5	1.8
More Relaxed Life-style	2.6	2.1	0.0	0.6
Be Able To Bring Family To U.S.A.	6.3	0.6	1.0	0.9
Become A Permanent Resident	0.0	1.7	0.0	0.9
See Nation Get Better Overall	1.7	0.2	0.2	1.6
Maintain Tradition/Culture	0.0	0.0	0.0	0.3
Other	4.6	1.4	2.2	2.3
Don't Know	3.5	14.5	7.3	12.0
TOTAL	*	*	*	*

* Multiple Response

Source: Strategy Research Corporation

In comparison to Cubans, Puerto Ricans and Other Hispanic-Americans Mexican-Americans display a stronger desire to be more involved and recognized in all areas of politics.

Another variance that can be noted is that the percentage of contentment exhibited by respondents of Cuban origin or decent is quite high in comparison to the percentage of Mexican, Puerto Rican and Other Hispanic-Americans who are content with their current way of life in the United States. Twenty-three percent of all Cuban-American surveyed do not see a need to improve their present way of life. Responses for the other Hispanics were as follows: Mexican-Americans - 8.0%; Puerto Rican-Americans - 4.1%; Other Hispanic-Americans - 4.6%.

3. By Age Group

Hispanics 55 years of age and older are more content with their present way of life in the United States than Hispanics 18 to 54 years of age. Eighteen percent of Hispanics 55 years of age and older do not see a need to improve their current way of life.

In general, Hispanics of all ages want to see an improvement in their overall economic situation.

1987
U.S. HISPANIC MARKET
WAYS IN WHICH HISPANICS WANT TO IMPROVE THEIR WAY OF LIFE IN THE U.S.
BY AGE GROUP

	18-34	35-54	55+
Be Employed/Better Job	32.6%	35.6%	16.2%
Improve Economic Situation In General	29.6	27.2	24.8
Improve English Language	11.7	4.8	2.4
Content/Don't See Need For Improvement	3.5	9.6	17.7
To Own My Own Home	7.3	6.4	6.2
To Get An Education	7.0	3.0	4.5
Hispanics Need More Recognition/ Involvement In All Areas/Politics	4.4	4.4	4.7
Reduction Of Crimes/ Drugs/Violence	2.4	3.4	10.2
Better Future/Life For My Children	1.6	4.6	2.4

Continued. . .

1987
U.S. HISPANIC MARKET
WAYS IN WHICH HISPANICS WANT TO IMPROVE THEIR WAY OF LIFE IN THE U.S. BY AGE GROUP
(Continued)

	18-34	35-54	55+
Better Relations Between People	0.8%	1.9%	2.6%
More Relaxed Lifestyle	0.7	1.2	4.6
Be Able To Bring Family To U.S.A.	1.6	0.6	0.9
Become A Permanent Resident	0.6	2.7	0.0
See Nation Get Better Overall	0.3	0.3	1.6
Maintain Tradition/Culture	0.0	0.2	0.0
Other	1.9	0.9	3.8
Don't Know	11.7	11.4	15.1
TOTAL	*	*	*

* Multiple Response

Source: Strategy Research Corporation

Younger Hispanics desire to see improvements in their lives in terms of education and English language skills. Twelve percent of Hispanics 18 to 34 years of age want to improve their English skills, as compared to 4.8% of Hispanics 35 to 54 and 2.4% of Hispanics 55 years of age or older. Seven percent of younger Hispanics surveyed also desire to obtain a good or better education.

Ten percent of the Hispanics 55 years of age and older believe that their lives in the United States would improve if there were a reduction of crimes, drugs, and violence. There is a deeper concern among the older respondents with regard to the reduction of crime than among Hispanics 18-34 years of age (2.4%).

F. ECONOMIC STATUS

Hispanics were asked to think about their current economic situation, and

1) compare it to five years ago
2) compare it to (predict) what it will be in five years.

1. Current Economic Situation Compared To Five Years Ago

a. By Market Region

Some 45.5% of Hispanics believe that their current economic situation is "Better" than it was five years ago. Forty percent consider their present economic status "The Same," while 14.1% believe that they are "Worse" off now than they were five years ago.

1987
U.S. HISPANIC MARKET
PRESENT ECONOMIC SITUATION
COMPARED TO FIVE YEARS AGO
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
Better	45.5%	55.5%	43.4%	25.8%	43.1%	44.0%
The Same	40.4	28.7	43.2	54.4	33.5	50.5
Worse	14.1	15.8	13.4	19.8	23.4	5.5
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

The greatest improvement in economic status is perceived in the Northeast, where 55.5% of Hispanics consider their present economic status "Better" than it was five years ago. Hispanics in the Central region share this feeling the least; 25.8% feel that their situation has improved.

On the other hand, one-fourth (23.4%) of the Hispanics residing in the Southwest consider their economic situation "Worse" today than it was five years ago. In California, only 5.5% feel that their economic situation has gotten "Worse."

b. By Country Of Origin

One-half of the Puerto Rican-Americans (50.1%) state that their present economic situation is "Better" today than it was five years ago. These Hispanic-Americans report a greater positive change than any other group of HIspanic-Americans. Twenty-two percent of Puerto Rican-Americans, however, also feel that their financial situation has gotten "Worse."

1987
U.S. HISPANIC MARKET
PRESENT ECONOMIC SITUATION COMPARED TO FIVE YEARS AGO BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Better	41.0%	44.6%	50.1%	45.7%
The Same	47.3	40.6	28.2	46.8
Worse	11.7	14.8	21.7	7.5
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Among Cuban-Americans, 41.0% report an improvement in their economic situation.

Forty-five percent of the Mexican-Americans perceive their economic situation as "Better" than five years ago; 40.6% consider it "The Same;" and 14.8% say that their economic level is "Worse."

Among Hispanics of other than Mexican, Cuban or Puerto Rican descent, 46.8% report that their economic situation has not changed in the past five years. An additional 45.7% report a positive change in their financial state. These Hispanic-Americans have the lowest incidence of the economics in their home becoming "Worse" (7.5%).

c. By Age Group

When comparing the economic situations of Hispanics, past to present, younger Hispanics tend to improve more so than older ones.

Almost one-half (49.0%) of the younger Hispanics 18 to 34 years of age state that they are "Better" off economically than they were five years ago. This is the group with the least percentage of decline in financial situation ("Worse"-10.1%).

1987
U.S. HISPANIC MARKET
PRESENT ECONOMIC SITUATION
COMPARED TO FIVE YEARS AGO
BY AGE GROUP

	18-34	35-54	55+
Better	49.0%	42.4%	40.8%
The Same	40.9	40.0	39.8
Worse	10.1	17.6	19.4
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

A total of 42.4% of Hispanic-Americans 35 to 54 years of age and 40.8% of Hispanic-Americans 55+ believe that their economic situation is "Better" than it was five years ago. Incidence of financial decline for these Hispanics was reported by fewer than one-fifth of the respondents (19.4%).

2. Predicted Economic Situation Five Years From Today

Hispanics were also asked to predict what their economic situation would be five years into the future.

a. By Market Region

More than one-half of Hispanic-Americans are optimistic about their future economic situation; 55.4% feel that their economic condition in five years will be "Better" than today. Meanwhile, 31.2% think their future economic situation will be "The Same," and a total of 12.5% feel that it will be "Worse."

1987
U.S. HISPANIC MARKET
PREDICTED ECONOMIC SITUATION
IN THE NEXT FIVE YEARS
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
Better	55.4%	54.0%	71.8%	64.6%	52.5%	53.6%
The Same	31.2	25.8	23.1	24.2	37.7	32.0
Worse	12.5	19.5	2.1	11.2	8.1	14.3
Don't Know	0.9	0.7	3.0	0.0	1.7	0.1
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

The optimism of an improved situation is expressed most by Hispanics in the Southeast (71.8%), and least by those in the Southwest region (52.5%).

The prediction of a worsening economic situation is felt the most by Hispanics living in the Northeast (19.5%) and the least by Hispanics residing in the Southeast (2.1%).

Thirty-eight percent of the Southwest foresee their future economic situation as remaining "The Same."

b. By Country Of Origin

With the exeption of Mexican-Americans, approximately 57% of the Cuban, Puerto Rican, and Other Hispanic-Americans predict their economic status to get "Better" within the next five years; 54.1% of the Mexican-Americans also feel this way.

1987
U.S. HISPANIC MARKET
PREDICTED ECONOMIC SITUATION
IN THE NEXT FIVE YEARS
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Better	57.8%	54.1%	57.1%	57.2%
The Same	35.7	32.0	21.9	33.8
Worse	3.9	13.0	20.5	8.7
Don't Know	2.6	0.9	0.5	0.3
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

In comparison, one-fifth of the Puerto Rican-Americans (20.5%) predict their economic condition to get "Worse" within the next five years; this is greater than any other Hispanic group.

In total, 35.7% of the Hispanics of Cuban origin or descent foresee their economic situation to stay "The Same;" these Hispanics' prediction of stability is slightly higher than any other Hispanic-American group.

c. By Age Group

Sixty percent of Hispanics 18 to 34 years of age predict their economic condition to be "Better" in the next five years. These Hispanics are the most optimistic. Among Hispanics 55+, 47.4% expect an improvement in their economic level.

1987
U.S. HISPANIC MARKET
PREDICTED ECONOMIC SITUATION IN THE NEXT FIVE YEARS
BY AGE GROUP

	18-34	35-54	55+
Better	59.8%	52.9%	47.4%
The Same	26.9	36.4	34.5
Worse	12.1	10.2	17.4
Don't Know	1.2	0.5	0.7
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Comparatively, Hispanics 55 years of age and older have the highest prediction of a declining economic status. A total of 17.4% expect their situation to be "Worse" in five years. Hispanics 35 to 54 years of age (10.2%) register the least level of pessimism. A unchanging position - "The Same" - is expected in the next five years by 36.4% of Hispanics 35 to 54 years of age.

IX. CULTURAL LIFESTYLE MEASURES

IX. CULTURAL/LIFESTYLE MEASURES

In order to better understand the U.S. Hispanic, survey participants were queried with regard to their cultural lifestyles and preferences. Resultant data presents a view of some of the cultural patterns and lifestyles which characterize the U.S. Hispanic market.

The data presented in this section of the Report demonstrates the strength of the Hispanic culture and the pride in being Hispanic as well as the attitudes and perceptions of Hispanics and non-Hispanics on specific attitudinal indicators.

A. SELF IDENTIFICATION

Although they may have been living in the United States for many years and indeed are American citizens, many U.S. Hispanics still adhere to the Spanish language, culture and traditions of their country of origin.

To quantify the number of Hispanics who presently live in the U.S. as to their self identification, survey participants were asked, "How would you describe yourself?" The options were:

- Hispanic First/American Second
- Equally Hispanic and American
- American First/Hispanic Second

1. By Market Region

Almost three-fourths of Hispanic-Americans think of themselves as "Hispanic First/American second" (72.3%).

Hispanics in the Central region feel the strongest about their Hispanic background; 88.7% responded that they were "Hispanic First/American Second." This response is cited least frequently by Hispanic-Americans living in the Southwest region (63.8%).

1987
U.S.HISPANIC MARKET
HOW WOULD YOU DESCRIBE YOURSELF?
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
Hispanic First/ American Second	72.3%	77.4%	78.8%	88.7%	63.8%	73.3%
Equally Hispanic And American	20.6	17.5	13.7	10.7	25.1	21.6
American First/ Hispanic Second	7.1	5.1	7.5	0.6	11.1	5.1
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

One-fourth (25.1%) of Hispanics from the Southwest region consider themselves "Equally Hispanic and American." Eleven percent also perceive themselves as "American First/Hispanic Second," the highest percentage of all regions.

2. By Country Of Origin

Hispanics from countries such as El Salvador, Colombia, Nicaragua, etc., feel the strongest about their Hispanic upbringing. The phrase, "Hispanic First/American Second" received 76.4% of these Hispanics' mentions. Comparatively, 70.4% of Mexican-Americans feel that they are more Hispanic than American.

While three-fourths of Puerto Ricans consider themselves "Hispanic First/ American Second," 21.4% also classify themselves "Equally Hispanic and American," while only 3.6% contend that they are "American First/Hispanic Second."

1987
U.S. HISPANIC MARKET
HOW WOULD YOU DESCRIBE YOURSELF?
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Hispanic First/ American Second	74.2%	70.4%	75.0%	76.4%
Equally Hispanic And American	16.8	21.6	21.4	18.7
American First/ Hispanic Second	9.0	8.0	3.6	4.9
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

With regard to Cuban-Americans, a total of 74.2% typify themselves as "Hispanic First/American Second." By comparison, 16.8% are "Equally Hispanic and American." Nine percent consider themselves "American First."

3. By Age Group

Hispanics 35 to 54 years of age feel most strongly about being "Hispanic First/American Second" (77.1%). The idea of being "Equally Hispanic and American" is most prominent among younger Hispanics 18 to 34 years of age (22.5%) as well as among Hispanics 55 years of age and older (21.4%).

1987
U.S. HISPANIC MARKET
HOW WOULD YOU DESCRIBE YOURSELF?
BY AGE GROUP

	18-34	35-54	55+
Hispanic First/ American Second	69.6%	77.1%	71.1%
Equally Hispanic And American	22.5	17.2	21.4
American First/ Hispanic Second	7.9	5.7	7.5
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

The feeling of being "American First/Hispanic Second" occurs most often among younger Hispanics 18 to 34 years of age (7.9%).

B. SOCIAL ATTITUDES

U.S. Hispanics were asked several questions about their cultural lifestyles and preferences -- these had to do with Assimilation/"Americanization" and Entertainment.

Assimilation/"Americanization"

- "I Am Proud To Be Hispanic And I Believe Our Culture, Language And Traditions Should Be Preserved."
- "I Like To Socialize With Latin Friends."
- "I Like To Socialize With American Friends."
- "I Think That It Is Important To Vote During The Elections."
- "I Prefer To Buy From Shops With Spanish Speaking Personnel."

Entertainment

- "I Like To Listen To Latin Music."
- "I Like To Listen To American Music."
- "I Enjoy Dancing To Latin Rhythm."
- "I Enjoy Dancing To American Rhythm."

For each of these Assimilation/"Americanization" and Entertainment statements, respondents were asked to state their level of agreement. That is, they were asked to use a five-point rating scale to describe how much they agreed with each statement. The choices were:

Completely Agree
Somewhat Agree
Neither Agree Nor Disagree
Somewhat Disagree
Completely Disagree

Ninety-two percent of U.S. Hispanics are "Proud To Be Hispanic." They believe that "The Hispanic Culture, Language and Traditoins Should Be Preserved."

The "Socialization With Latin Friends" is also a strong cultural tie (88% agreement).

1987
U.S. HISPANIC MARKET
SUMMARY
SOCIAL ATTITUDES AMONG U.S. HISPANICS
COMPLETELY/SOMEWHAT AGREE SCORES

	Percent
"I Am Proud To Be Hispanic, And I Think Our Culture, Language And Traditions Should Be Preserved	92.1%
"I Like To Socialize With Latin Friends"	88.3
"I Think It's Important To Vote In The Elections"	85.6
"I Like To Listen To Latin Music"	83.9
"I Enjoy Dancing To Latin Rhythm"	76.5
"I Like To Socialize With American Friends"	74.6
"I Like To Listen To American Music"	71.5
"I Enjoy Dancing To American Music"	64.6

Source: Strategy Research Corporation

Eighty-six percent of U.S. Hispanics agree that "It Is Important To Vote During The Elections."

1. By Market Region

It is clear that the Hispanic community is **very proud** of its background and believes in preservation of their culture and heritage.

More than nine out of ten U.S. Hispanics agree with, "I Am Proud To Be Hispanic And I Think Our Culture, Language And Traditions Should Be Preserved."

Three other factors which ranked very high among Hispanics were the "Enjoyment Of Socializing With Latin Friends" (88.3% agreement), "The Importance Of Voting In The Elections" (85.6% agreement) and "The Enjoyment Of listening To Latin Music" (83.9% agreement).

These four factors characterize a vast majority of the Hispanic-Americans. In each of these factors, at least eight out of ten Hispanics agree with these characteristics and statements.

"Enjoyment Of Dancing To Latin Rhythm" was the fifth most cited item mentioned by the Hispanics in terms of agreement.

Overall, three-fourths of all U.S. Hispanics "Like To Socialize With American Friends" and 72% also "Like To Listen To American Music." Almost two-thirds "Enjoy Dancing To American Rhythm" (64.6%).

1987
U.S. HISPANIC MARKET
SOCIAL ATTITUDES AMONG U.S. HISPANICS COMPLETELY/SOMEWHAT AGREE SCORES BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
"I Am Proud To Be Hispanic, And I Think Our Culture Language And Traditions Should Be Preserved"	92.1%	99.1%	98.8%	96.4%	89.4%	88.6%
"I Like To Socialize With Latin Friends"	88.3	93.8	97.3	96.3	84.0	86.9
"I Think It's Important To Vote In The Elections"	85.6	88.4	91.5	89.2	83.9	83.3
"I Like To Listen To Latin Music"	83.9	93.5	96.2	87.4	83.7	76.4
"I Enjoy Dancing To Latin Rhythm"	76.5	85.8	85.7	78.4	74.3	72.1
"I Like To Socialize With American Friends"	74.6	85.6	89.4	81.0	72.4	68.0
"I Like To Listen To American Music"	71.5	85.0	85.5	69.7	68.7	65.2
"I Enjoy Dancing To American Music"	64.6	75.1	74.6	54.1	61.7	61.6

Source: Strategy Research Corporation

Virtually all Hispanics in the Northeast, Southeast, and Central regions feel very strongly about their Hispanic background. A total of 99.1%, 98.8%, and 96.4%, respectively agreed with the concept "I Am Proud To Be Hispanic And I Think Our Culture, Language, And Traditions Should Be Preserved." To a lesser degree, 89.4% of the Hispanics residing in the Southwest, as well as 88.6% of those in the California area, agreed completely or somewhat with this attitudinal statement.

It is evident that the U.S. Hispanic community is not a polarized one. Specifically, we see a very bi-cultural community. Even though there is a saturation of language/culture/tradition, U.S. Hispanics are somewhat assimilated to American cultural patterns. Overall, 76.5% of U.S. Hispanics "Enjoy Socializing with American Friends," 71.5% "Like To Listen To American Music," and 64.6% also "Enjoy Dancing To American Rhythm."

2. By Country Of Origin

It is evident that U.S. Hispanics, regardless of country of origin, are proud of their Hispanic heritage and language and show a strong desire to preserve their culture and traditions.

Puerto Rican-Americans display the highest incidence of agreement (99.8%) with the attitudinal statement, "I Am Proud To Be Hispanic And I Think Our Culture, Language And Traditions Should Be Preserved."

1987
U.S. HISPANIC MARKET
SOCIAL ATTITUDES AMONG U.S. HISPANICS
COMPLETELY/SOMEWHAT AGREE
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
"I Am Proud To Be Hispanic, And I Think Our Culture, Language And Traditions Should Be Preserved"	97.6%	90.8%	99.8%	89.3%
"I Like To Socialize With Latin Friends"	96.3	88.6	95.9	81.1
"I Think It's Important To Vote In The Elections"	84.0	85.9	89.7	83.4

Continued. . .

1987
U.S. HISPANIC MARKET
SOCIAL ATTITUDES AMONG U.S. HISPANICS COMPLETELY/SOMEWHAT AGREE SCORES BY COUNTRY OF ORIGIN

(Continued)

	Cuba	Mexico	Puerto Rico	Other
"I Like To Listen To Latin Music"	93.9%	82.0%	92.4%	80.7%
"I Enjoy Dancing To Latin Rhythm"	86.5	73.0	83.0	79.6
"I Like To Socialize With American Friends"	92.5	68.6	85.7	76.9
"I Like To Listen To American Music"	88.3	64.7	83.6	75.2
"I Enjoy Dancing To American Rhythm"	78.4	59.9	70.0	68.6

Source: Strategy Research Corporation

When comparing Mexican-Americans and Other Hispanics to Puerto Rican-Americans and Cuban-Americans, we see that Hispanics from Puerto Rico and Cuba show higher levels of agreement with the attitudinal statements regarding socializing with Latin friends, listening to Latin music and dancing to Latin rhythms.

Nevertheless, Cubans, more so than other Hispanic groups, "Like To Socialize With American Friends" (92.5%).

3. By Age Group

Age is not a factor in terms of how Hispanics feel about their heritage, culture and language and the preservation of these.

1987
U.S. HISPANIC MARKET
SOCIAL ATTITUDES AMONG U.S. HISPANICS
COMPLETELY/SOMEWHAT AGREE SCORES
BY AGE GROUP

	18-34	35-54	55+
"I Am Proud To Be Hispanic, And I Think Our Culture, Language And Traditions Should Be Preserved"	90.5%	94.1%	93.3%
"I Like To Socialize With Latin Friends"	87.9	87.4	91.6
"I Think It's Important To Vote In The Elections"	81.7	91.4	86.2
"I Like To Listen To Latin Music"	82.4	84.7	86.4
"I Enjoy Dancing To Latin Rhythm"	78.1	79.1	67.1
"I Like To Socialize With American Friends"	76.0	77.8	64.9
"I Like To Listen To American Music"	73.7	74.9	58.9
"I Enjoy Dancing To American Rhythm"	69.5	67.2	46.4

Source: Strategy Research Corporation

However, slight variances exist when comparing Hispanics under 55 years of age to those 55 years of age and older. Specifically, Hispanics 55+ display a lower level of agreement with such attitudinal statements as, "Socializing With American Friends," "Listening To American Music" and "Dancing To American Rhythm."

Language fluency may be a factor contributing to this lower incidence of agreement among elderly Hispanics regarding socializing with Americans and sharing their cultural activities such as dancing and listening to music.

C. ATTITUDINAL INDICATORS

To gauge the relative attitudes Hispanics and non-Hispanics have toward social and cultural issues, respondents were asked to state the degree of agreement that each of 15 concept statements had upon them. A five-point rating scale was used ranging from "1 - Totally Disagree" to "5 - Completely Agree."

Totally Disagree — Completely Agree

1 2 3 4 5

Specifically, respondents were asked, "Now we are going to use a scale from one (1) to five (5). A number one (1) means that you totally disagree with the statement I am going to read. A number five (5) means that you totally agree with the statement I am going to read to you. You need not rate each statement a one (1) or a five (5), but rather you may choose any number in between such as a two (2), three (3) or four (4). Only keep in mind that the higher the rating you give, the more you are in agreement with the statement, and the lower the numeric rating you give, the more you disagree with the statement. How much do you agree with the following phrase. . .?"

* "When It Comes To Buying More Expensive Household Items, Like A Car Or TV, The Man Of The House Should Make The Decision."
* "The Popular Name Brands I Use Most Often Today Are Going To Be The Same Brands I Will Be Using Next Year."
* "I Often Attend Hispanic Festivals and Events."
* "I Am In Support Of The U.S. Space Program (NASA) — Outer Space Should Be Explored."
* "I Don't Buy Brands I Have Never Heard Of, Even If They Cost Less."
* "Unless The Extra Money Is Needed, A Married Woman With Children Should Not Work Outside The Home."
* "My Family Is The Single Most Important Thing To Me."
* "I Believe A College Degree Is Very Important In Today's Society."
* "A Woman's Life Is Fulfilled Only If She Can Provide A Happy Home For Her Family."
* "My Family Often Has A Barbecue Or A Picnic."

- "Most Of The Meals Served In My Home Are Made From Scratch."
- "The Most Reliable And Best Products Are Made By American Companies."
- "When Shopping, I Consider Brands/Companies Which Have Shown Interest And Really Appreciate The Hispanic Consumer."
- "Nationally Advertised And Popular Name Brands Are Superior In Quality To Store Brands."
- "Nationally Advertised And Popular Name Brands Are The Best Products For My Family."

To better understand the degree of respondents' perceptions, a weighted average was calculated by assigning a numeric value to each of the possible responses. These numeric values ranged from "1 - Totally Disagree" to "5 - Totally Agree."

Thus, each degree of agreement was measured on a continuum, running from one to five.

The following table shows the weighted averages of Hispanic and non-Hispanic responses for each of the 15 attitudinal statements tested.

1987
U.S. HISPANIC MARKET
SOCIAL AND CULTURAL ISSUES
WEIGHTED AVERAGES

	Hispanic	Non-Hispanic
"My Family Is The Single Most Important Thing To Me"	4.83	4.44
"I Believe A College Degree Is Very Important In Today's Society"	4.47	4.22
"A Woman's Life Is Fulfilled Only If She Can Provide A Happy Home For Her Family"	4.11	3.10
"My Family Often Has A Barbecue Or A Picnic"	4.01	2.98
"Most Of The Meals Served In My Home Are Made From Scratch"	3.84	3.70

Continued. . .

1987
U.S. HISPANIC MARKET
SOCIAL AND CULTURAL ISSUES
WEIGHTED AVERAGES
(Continued)

	Hispanic	Non-Hispanic
"The Most Reliable And Best Products Are Made By American Companies"	3.81	3.92
"When Shopping, I Consider Brands/ Companies Which Have Shown Interest And Really Appreciate The Hispanic Consumer"	3.70	2.73
"Nationally Advertised And Popular Name Brands Are Superior In Quality To Store Brands"	3.58	3.42
"Nationally Advertised And Popular Name Brands Are The Best Products For My Family"	3.56	3.46
"I Am In Support Of The U.S. Space Program (NASA) -- Outer Space Should Be Explored"	3.44	3.71
"I Don't Buy Brands I Have Never Heard Of, Even If They Cost Less"	3.32	2.97
"Unless The Extra Money Is Needed A Married Woman With Children Should Not Work Outside The Home"	3.32	2.88
"When It Comes To Buying More Expensive Household Items Like A Car Or TV, The Man Of The House Should Make The Decision"	3.32	2.47
"The Popular Name Brands I Use Most Often Today Are Going To Be The Same Brands I Will Be Using Next Year"	3.28	3.84
"I Often Attend Hispanic Festivals And Events"	3.27	2.09

Source: Strategy Research Corporation

Hispanics display a tendency to be slightly more family oriented than non-Hispanics. A mean average of 4.83 was recorded among Hispanics with regard to the statement, "My Family Is The Single Most Important Thing To Me." In comparison, a 4.44 mean average rating was recorded among non-Hispanics.

Consequently, as a result of the importance Hispanics place on family unity, welfare and interaction, attitudinal statements relating to the family unit received higher levels of agreement from Hispanics than non-Hispanics. A greater percentage of Hispanics agreed (4.01 mean average rating) that they "Often Shared A Family Barbecue Or Picnic," whereas a 2.98 mean average rating was recorded by the non-Hispanics with regard to this type of family activity. Another example of how Hispanics feel about the family is the level of agreement received from Hispanic respondents as compared to non-Hispanic persons with the statement "A Woman's Life Is Fulfilled Only If She Can Provide A Happy Home For Her Family" (4.11 mean average rating among Hispanics, 3.10 mean average rating among non-Hispanics).

Regarding education, a mean average rating of 4.47 was recorded among Hispanics for having "A College Degree Is Very Important In Today's Society." In comparison, a mean average rating of 4.22 was recorded among non-Hispanic respondents. Perhaps because Hispanics are more likely to encounter discrimination when seeking better opportunities in life, they place a higher degree of importance than non-Hispanics on such issues as education.

The role of a woman, as compared to a man, is viewed differently by Hispanics and by non-Hispanics. Attitudinal statements such as: "Unless The Extra Money Is Needed, A Married Woman With Children Should Not Work Outside The Home," and "When It Comes To Buying More Expensive Household Items, Like A Car Or TV, The Man Of The House Should Make The Decision," received a greater percentage of agreement from Hispanics than non-Hispanics.

There is a strong belief among Hispanics and non-Hispanics alike regarding products made by American companies. Among Hispanics, a 3.81 mean average was recorded, while a 3.92 mean average was recorded among non-Hispanics that "The Most Reliable And Best Products Are Made By American Companies."

The Hispanic consumer places a somewhat higher value on brand name products than do non-Hispanic consumers. Hispanic-Americans believe that "Nationally Advertised And Popular Name Brands Are Superior In Quality To Store Brands" (3.58 mean rating). Comparatively, a 3.42 mean average was recorded by non-Hispanics. In addition, Hispanics, more so than non-Hispanics, feel that "Nationally Advertised And Popular Name Brands Are The Best Products For Their Families."

Non-Hispanics show a slightly greater degree of support for the U.S. Space Program than Hispanics.

X. FAST FOOD RESTAURANT PATRONAGE

X. FAST-FOOD RESTAURANT PATRONAGE

This section of the Report presents data with regard to the patronage by Hispanics of three popular types of Fast-Food Restaurants:

- Hamburger
- Chicken
- Pizza

The data in the following table demonstrates the Hispanic strength in patronage of Fast-Food Restaurants.

For example, 85.0% of U.S. Hispanics patronize Hamburger Fast-Food Restaurants with an average of 2.8 visits per month. This compares to an 81.7% level of incidence for Chicken Fast-Food Restaurant patronage and a frequency of approximately 2.2 times per month.

1987
U.S. HISPANIC MARKET
INCIDENCE AND FREQUENCY*
OF PATRONAGE
FAST-FOOD RESTAURANTS

Type Of Restaurant	Yes, Go	Monthly Frequency
Hamburger	85.0%	2.8
Chicken	81.7	2.2
Pizza	76.5	1.9

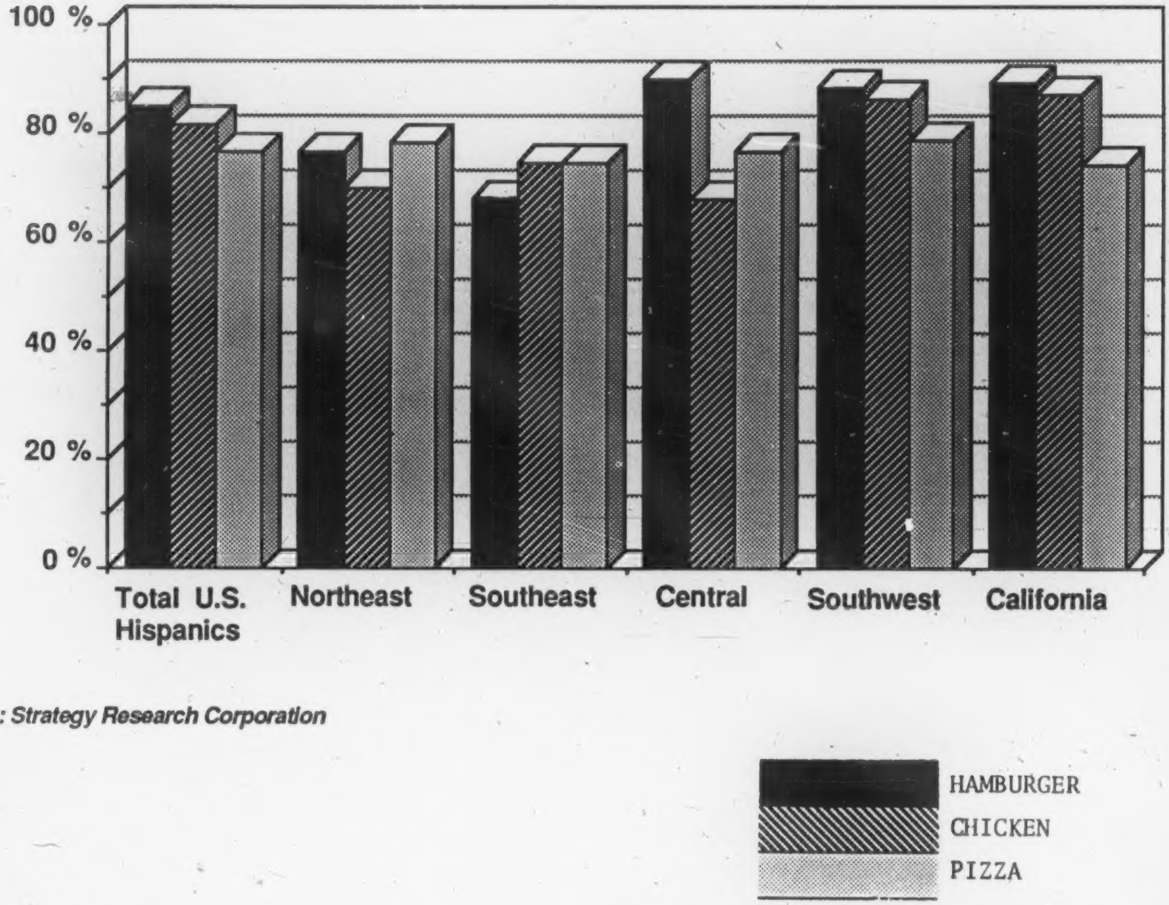
* Average Visits Per Month

Source: Strategy Research Corporation

Pizza type Fast-Food Restaurants are patronized slightly less often (76.5%), however, frequency still registers at approximately 1.9 visits per month.

1987
U.S. Hispanic Market

Incidence of Patronage Fast-Food Restaurants By Market Region



Source: Strategy Research Corporation

A. HAMBURGER FAST-FOOD RESTAURANTS

1. By Market Region

Patronage of Fast-Food Hamburger Restaurants is highest in the Southwest and California, while it is lowest in the Northeast and Southeast.

A total of 32.3% of the California Hispanics indicate patronage more than once a week, as do 27.8% of those in the Southwest.

1987
U.S. HISPANIC MARKET
FREQUENCY OF PATRONAGE
FAST-FOOD HAMBURGER RESTAURANTS
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
More Than Once A Week	26.8%	19.5%	23.5%	19.2%	27.8%	32.3%
Once A Week	26.3	26.4	18.7	33.0	30.6	22.5
Twice A Month	13.0	8.9	14.2	19.0	10.6	16.3
Once A Month	10.3	11.8	8.8	11.9	10.9	8.6
Less Than Once A Month	8.6	9.9	2.8	7.0	8.5	9.4
Never Go	15.0	23.5	32.0	9.9	11.6	10.9
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average Number Of Visits Per Month	2.8	2.4	2.3	2.8	3.0	3.0

Source: Strategy Research Corporation

Thirty-two percent of the Hispanics in the Southeast stated that they never eat at or take food from Fast-Food Hamburger Restaurants; 23.5% of the Hispanics in the Northeast responded similarly.

2. By Country Of Origin

Fast-Food Hamburgers are more familiar to the Mexican-American diet. Eighty-nine percent of the Mexican-American population frequent Hamburger type Fast-Food Restaurants, and 57.5% patronize them at least once a week.

1987
U.S. HISPANIC MARKET
FREQUENCY OF PATRONAGE
FAST-FOOD HAMBURGER RESTAURANTS
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
More Than Once A Week	20.2%	27.5%	19.4%	32.1%
Once A Week	17.9	30.0	28.3	17.9
Twice A Month	13.8	13.5	11.3	12.1
Once A Month	16.9	9.4	11.8	9.4
Less Than Once A Month	4.9	8.5	4.2	13.8
Never Go	26.3	11.1	25.0	14.7
TOTAL	100.0%	100.0%	100.0%	100.0%
Average Number Of Visits Per Month	2.2	3.0	2.5	2.7

Source: Strategy Research Corporation

Of the different Hispanic-Americans, Cuban-Americans and Puerto Rican-Americans are the least likely to eat at Hamburger Fast-Food places. Approximately one-fourth of Cuban-Americans, as well as Puerto Rican-Americans, do not patronize this type of eating establishment.

3. By Age

The incidence of patronizing Hamburger Fast-Food Restaurants is higher among younger Hispanics. A total of 89.3% of those 18 to 34 years of age, and 84.4% of those 35 to 54 frequent these types of eating places. In comparison, 73.9% of Hispanics 55+ patronize Fast-Food Hamburger Restaurants.

1987
U.S. HISPANIC MARKET
FREQUENCY OF PATRONAGE
FAST-FOOD HAMBURGER RESTAURANTS
BY AGE GROUP

	18-34	35-54	55+
More Than Once A Week	30.0%	28.6%	14.7%
Once A Week	27.0	24.8	27.2
Twice A Month	15.3	11.4	9.0
Once A Month	9.7	10.1	12.5
Less Than Once A Month	7.3	9.5	10.5
Never Go	10.7	15.6	26.1
TOTAL	100.0%	100.0%	100.0%
Average Number Of Visits Per Month	3.0	2.8	2.2

Source: Strategy Research Corporation

Fifty-seven percent of the 18 to 34 year old Hispanics frequent a Fast-Food Hamburger Restaurant once a week or more often, compared to 41.9% of Hispanics 55 years of age and older.

B. CHICKEN FAST-FOOD RESTAURANTS

1. By Market Region

The incidence of eating at or taking out food from Fast-Food Chicken Restaurants is higher among Hispanics in California and the Southeast. Hispanics in these two market areas average 2.4 visits per month.

Hispanics in the Central portion of the U.S. are the lightest consumers of Fast-Food Chicken — 32% do not patronize these types of eating establishments.

1987
U.S. HISPANIC MARKET
FREQUENCY OF PATRONAGE
FAST-FOOD CHICKEN RESTAURANTS
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
More Than Once A Week	16.0%	14.7%	28.8%	10.9%	10.6%	19.0%
Once A Week	20.1	18.9	12.5	14.9	24.4	20.5
Twice A Month	16.5	9.5	14.2	11.3	20.3	18.5
Once A Month	18.1	13.6	14.9	12.9	21.8	17.2
Less Than Once A Month	11.0	13.1	4.0	18.1	9.1	12.0
Never Go	18.3	30.2	25.6	31.9	13.8	12.8
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average Number Of Visits Per Month	2.2	1.9	2.4	1.6	2.2	2.4

Source: Strategy Research Corporation

A total of 41.3% of the Hispanics in the Southeast patronize Fast-Food Chicken Restaurants at least once a week, as do 39.5% of the Hispanics in the California market.

2. By Country Of Origin

Mexican-Americans are the heaviest users of Fast-Food Chicken Restaurants, while Puerto Rican-Americans are the least likely to patronize these type of Fast-Food Restaurants. A total of 86.6% of Mexicans-Americans eat at Fast-Food Chicken places, compared to 65.0% of Puerto Rican-Americans.

1987
U.S. HISPANIC MARKET
FREQUENCY OF PATRONAGE
FAST-FOOD CHICKEN RESTAURANTS
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
More Than Once A Week	20.7%	15.1%	11.9%	20.1%
Once A Week	21.4	20.2	18.1	21.3
Twice A Month	17.1	17.5	11.6	16.3
Once A Month	11.1	22.9	10.7	12.0
Less Than Once A Month	6.9	10.9	12.7	12.1
Never Go	22.8	13.4	35.0	18.2
TOTAL	100.0%	100.0%	100.0%	100.0%
Average Number Of Visits Per Month	2.4	2.2	1.7	2.4

Source: Strategy Research Corporation

Fast-Food Chicken Restaurants are patronized once a week or more often by 42.1% of Cuban-Americans, 35.3% of Mexican-Americans, 30.0% of Puerto Rican-Americans, and 41.4% of Other Hispanic-Americans.

3. By Age

Consumption of food from Fast-Food Chicken Restaurants is highest among younger Hispanics. More than eight out of ten (84.4%) Hispanics 18 to 34 years of age currently patronize Chicken type Fast-Food Restaurants, compared to 74.1% of Hispanics 55 years of age and older.

1987
U.S. HISPANIC MARKET
FREQUENCY OF PATRONAGE
FAST-FOOD CHICKEN RESTAURANTS
BY AGE GROUP

	18-34	35-54	55+
More Than Once A Week	16.4%	16.4%	13.9%
Once A Week	19.8	18.7	23.8
Twice A Month	18.4	16.8	10.1
Once A Month	18.9	17.8	16.6
Less Than Once A Month	10.9	11.8	9.7
Never Go	15.6	18.5	25.9
TOTAL	100.0%	100.0%	100.0%
Average Number Of Visits Per Month	2.2	2.1	2.1

Source: Strategy Research Corporation

On average, U.S. Hispanics 18 to 34 years of age visit Chicken Fast-Food Restaurants 2.2 times per month, compared to 2.1 visits per month for older (35+) Hispanics.

C. PIZZA FAST-FOOD RESTAURANTS

1. By Market Region

Pizza Fast-Food Restaurants are popular among U.S. Hispanics. Overall, more than three-fourths (76.5%) patronize these types of eating establishments.

1987
U.S. HISPANIC MARKET
FREQUENCY OF PATRONAGE
FAST-FOOD PIZZA RESTAURANTS
BY MARKET REGION

	Total	Northeast	Southeast	Central	Southwest	California
More Than Once A Week	14.6%	28.2%	19.8%	18.7%	5.7%	13.6%
Once A Week	15.7	19.2	8.0	18.0	17.5	14.3
Twice A Month	13.1	7.5	13.4	13.2	13.4	15.1
Once A Month	16.3	7.4	20.5	7.8	23.4	14.8
Less Than Once A Month	16.8	16.2	12.7	19.0	18.6	16.4
Never Go	23.5	21.5	25.6	23.3	21.4	25.8
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average Number Of Visits Per Month	1.9	2.5	1.8	2.1	1.6	1.8

Source: Strategy Research Corporation

The frequency of visits to Fast-Food Pizza places is highest among Hispanics in the Northeast -- almost one-half (47.4%) frequent Pizza Restaurants once a week or more often. The Central region accounts for the second highest level of Fast-Food Pizza consumption (a total of 30.7% visit Fast-Food Pizza Restaurants at least once a week), while Hispanics in the United States Southwest are the lightest consumers (23.2% visit pizza restaurants once a week or more often).

2. By Country Of Origin

In general, Puerto Rican-Americans tend to be the heaviest consumers of Fast-Food Pizza. Puerto Rican-Americans average 2.3 visits to a Fast-Food Pizza Restaurant per month, with 42.3% frequenting this type of food establishment at least once a week.

1987
U.S. HISPANIC MARKET
FREQUENCY OF PATRONAGE
FAST-FOOD PIZZA RESTAURANTS
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
More Than Once A Week	15.4%	10.5%	27.3%	17.6%
Once A Week	8.9	15.8	15.0	18.1
Twice A Month	12.3	14.9	7.4	11.7
Once A Month	28.8	18.0	8.0	11.6
Less Than Once A Month	10.5	18.1	17.8	15.5
Never Go	24.1	22.7	24.5	25.5
TOTAL	100.0%	100.0%	100.0%	100.0%
Average Number Of Visits Per Month	1.7	1.7	2.3	2.0

Source: Strategy Research Corporation

Cuban-Americans and Mexican-Americans average 1.7 visits per month to a Fast-Food Pizza Restaurant.

3. By Age

As with Hamburger and Chicken Fast-Food Restaurants, the patronage of Pizza Restaurants is also skewed toward younger Hispanics. That is, a total of 81.1% of the Hispanics who are 18 to 34 years of age are consumers at Fast-Food Pizza Restaurants, compared to 75.1% of those 35 to 54 years of age, and 65.9% of the Hispanics 55 years of age and older.

1987
U.S. HISPANIC MARKET
FREQUENCY OF PATRONAGE
FAST-FOOD PIZZA RESTAURANTS
BY AGE GROUP

	18-34	35-54	55+
More Than Once A Week	15.9%	14.7%	11.4%
Once A Week	19.2	14.7	7.1
Twice A Month	15.0	9.0	14.8
Once A Month	12.8	20.3	19.1
Less Than Once A Month	18.2	16.4	13.5
Never Go	18.9	24.9	34.1
TOTAL	100.0%	100.0%	100.0%
Average Number Of Visits Per Month	2.1	1.8	1.4

Source: Strategy Research Corporation

The incidence of patronage at least once a week registers 35.1% for the younger (18 to 34 year old) Hispanics; it registers 29.4% for those 35 to 54 years of age, and 18.5% among those who are older (55+).

XI. FOOD STORE PATRONAGE

XI. FOOD STORE PATRONAGE

Hispanics were asked to name the type of store in which they purchased food and grocery related items most often. They were also queried with regard to brand loyalty, whether or not they ever use price-off coupons and how much they spent weekly at the grocery store. Their use of shopping lists was also explored.

A. TYPE OF STORE PATRONIZED MOST OFTEN

The American Chain Supermarket is by far the most popular type of food store patronized by U.S. Hispanics.

The American Chain Supermarket registers its highest level of patronage among Hispanics in the U.S. Central region (75.8%), and lowest level among those in the Southeast (24.9%).

1987
U.S. HISPANIC MARKET
TYPE OF FOOD STORE
PATRONIZED MOST FREQUENTLY
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
American Chain Supermarket	62.5%	49.5%	24.9%	75.8%	70.2%	67.0%
Hispanic Supermarket	30.5	38.4	64.1	22.4	25.0	26.7
Hispanic "Bodeguita"	3.3	8.3	5.4	1.8	2.8	1.1
Convenience Store	3.0	3.8	0.9	0.0	1.7	4.5
Anywhere	0.7	0.0	4.7	0.0	0.3	0.7
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Hispanic-owned Supermarkets are frequented most often by Hispanics residing in the Southeast (64.1%). The next highest incidence of Hispanic Supermarket patronage occurs in the Northeast where 38.4% of Hispanics shop at this type of store.

Meanwhile, Hispanic Supermarkets record their lowest level of patronage in the Central region (22.4%).

Convenience Stores record their highest level of patronage (4.5%) among Hispanics in the California region.

Hispanic "Bodeguitas" received their highest level of mention from Hispanics in the Northeast (8.3%).

2. By Country Of Origin

The American Chain Supermarket received the most mentions from Mexican-Americans. Mexican-Americans, more so than other Hispanic-Americans, prefer the American Chain Supermarket (67.6%). Slightly more than one-fourth (26.9%) of the Mexican-Americans also shop at Hispanic-owned Supermarkets.

1987
U.S. HISPANIC MARKET
TYPE OF FOOD STORE
PATRONIZED MOST FREQUENTLY
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
American Chain Supermarket	43.3%	67.6%	56.3%	59.6%
Hispanic Supermarket	48.2	26.9	32.6	33.1
Hispanic "Bodeguita"	4.3	2.0	7.8	3.5
Convenience Store	2.2	2.9	3.3	2.9
Anywhere	2.0	0.6	0.0	0.9
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Those persons who cited Cuba as their country of origin named Hispanic-owned Supermarkets most often (48.2%); the American Chain Supermarket received mentions of 43.3% by these Hispanic-Americans. A total of 4.3% of the Cuban Hispanics also named the Hispanic "Bodeguita."

Similarly, the patronage of Hispanic-oriented Stores is also strong among Puerto Rican-Americans and Other Hispanic-Americans such as those from Central and South America. Namely, the Hispanic Supermarket was cited by 32.6% of the Puerto Rican-Americans, as it was among 33.1% of the Other Hispanic-Americans. In this regard, the Hispanic "Bodeguita" was named by 7.8% of the Puerto Rican Hispanics and 3.5% of the Other Hispanic-Americans. Nevertheless, the American Chain Supermarket was named by the majority of both of these Hispanic-American groups (56.3% — Puerto Ricans, 59.6% — Other Hispanics).

3. By Age

Regardless of age, six out of ten U.S. Hispanics shop most frequently at an American Chain Supermarket.

1987
U.S. HISPANIC MARKET
TYPE OF FOOD STORE
PATRONIZED MOST FREQUENTLY
BY AGE GROUP

	18-34	35-54	55+
American Chain Supermarket	63.3%	62.1%	61.0%
Hispanic Supermarket	29.8	32.4	29.1
Hispanic "Bodeguita"	3.3	2.8	4.3
Convenience Store	3.4	2.0	3.4
Anywhere	0.2	0.7	2.2
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Thirty percent of U.S. Hispanics also patronize Hispanic-type Supermarkets.

B. BRAND LOYALTY

Hispanics were asked whether they usually stay with one brand or switched frequently.

1. By Market Region

Approximately one out of five Hispanic consumers (20.6%) stated that they frequently changed brands, while 44.9% said they were loyal to their brands. The remaining 34.5% said that it depended. . .

1987
U.S. HISPANIC MARKET
BRAND LOYALTY
BY MARKET REGION

	Total	Northeast	Southeast	Central	Southwest	California
Change Brands	20.6%	25.2%	20.5%	11.4%	16.2%	21.8%
Stay With Brands	44.9	47.1	41.2	48.1	44.8	43.7
Depends	34.5	27.7	38.3	40.5	39.0	34.5
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Hispanics in the Northeast reportedly change brands most frequently (25.2%), while Hispanics in the Central region change brands least (11.4%).

2. By Country Of Origin

Hispanics who cited their country of origin as Puerto Rico change brands slightly more often (23.1%), while Hispanics whose country of origin is Mexico and Cuba change brands the least (19.6% and 19.4%, respectively).

1987
U.S. HISPANIC MARKET
BRAND LOYALTY
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Change Brands	19.4%	19.6%	23.1%	22.7%
Stay With Brands	45.8	46.4	49.6	37.0
Depends	34.8	34.0	27.3	40.3
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Thirty-seven percent of Latins from countries such as Central or South America stated that they usually stay with the same brands; 40.3% stated that it depends.

3. By Age

There are slight differences between age groups regarding brand loyalty and changing brands.

1987
U.S. HISPANIC MARKET
BRAND LOYALTY
BY AGE GROUP

	18-34	35-54	55+
Change Brands	22.0%	19.2%	18.7%
Stay With Brands	42.5	47.2	47.8
Depends	35.5	33.6	33.5
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

The younger 18 to 34 age group recorded the highest response rate for changing brands (22.0%).

C. WEEKLY GROCERY EXPENDITURES

The average weekly grocery expenditure for a U.S. Hispanic family is approximately $102.41.

1987
U.S. HISPANIC MARKET
AVERAGE WEEKLY GROCERY EXPENDITURES BY MARKET REGION

	Average Weekly
Total U.S. Hispanic	**$102.41**
Northeast	105.31
Southeast	101.90
Central	93.67
Southwest	93.85
California	103.08

Source: Strategy Research Corporation

The dollars spent on groceries is highest in the Northeast region where Hispanics spend an average of $105.31 weekly.

Hispanic-Americans in California record the second highest weekly grocery expenditure ($103.08), while Hispanics in the Central and Southwest regions spend the least amount of money weekly ($93.67 and $93.85, respectively).

D. COUPON USAGE

This section explores the use of Price-Off Coupons when shopping.

1. Preparation Of Shopping Lists

First, survey participants were queried with regard to their preparation of a Shopping List prior to their trip to the Supermarket. This question was asked prior to the coupon usage questions, as many times coupons are used only when it is known in advance that a particular product/brand is to be purchased.

a. By Market Region

Slightly more than one-fifth (21.8%) of all U.S. Hispanics said that they "Always" prepare a Shopping List before going to the grocery store. Thirty-two percent "Sometimes" prepare a List, while almost one-half (46.5%) "Never" do.

1987
U.S. HISPANIC MARKET
USE OF SHOPPING LISTS
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
Always	21.8%	18.4%	40.2%	10.2%	25.3%	18.5%
Sometimes	31.7	30.4	30.3	41.4	32.4	30.6
Never	46.5	51.2	29.5	48.4	42.3	50.9
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

The incidence of Shopping List preparation is highest (40.2%) among Hispanics in the Southeast, yet it is lowest (10.2%) among Hispanics in the Central region.

b. By Country Of Origin

One-third (34.4%) of Cuban-Americans "Always" prepare a Shopping List when they need to go shopping - the highest level recorded among all U.S. Hispanics.

1987
U.S. HISPANIC MARKET
USE OF SHOPPING LISTS
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Always	34.4%	22.1%	20.1%	16.9%
Sometimes	27.9	31.4	28.8	36.5
Never	37.7	46.5	51.1	46.6
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Slightly over one-half (51.1%) of the Puerto Rican Hispanic-Americans "Never" take the time to prepare a Shopping List, nor do 46.5% of the Mexican-Americans. A similar level (46.6%) to that of Mexican-Americans was recorded by Hispanics from countries such as El Salvador, Guatemala, Colombia, etc.

3. By Age

The preparation of a Shopping List registers its highest level of incidence among older Hispanics.

1987
U.S. HISPANIC MARKET
USE OF SHOPPING LISTS
BY AGE GROUP

	18-34	35-54	55+
Always	19.4%	23.0%	26.5%
Sometimes	32.2	31.8	30.0
Never	48.4	45.2	43.5
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Younger Hispanics have the highest tendency "Never" to prepare Shopping Lists.

2. Incidence Of Coupon Usage

Hispanics were asked, "Do You Ever Use Price-Off Coupons When You Go Shopping?"

a. By Market Region

Overall, slightly less than four out of ten U.S. Hispanics (38.1%) use Price-Off Coupons when they shop.

1987
U.S. HISPANIC MARKET
PRICE-OFF COUPONS
INCIDENCE OF USAGE
BY MARKET REGION

	Total	Northeast	Southeast	Central	Southwest	California
Yes	38.1%	30.3%	51.3%	23.4%	44.4%	35.1%
No	61.9	69.7	48.7	76.6	55.6	64.9
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

The highest level of use is by Hispanics in the Southeast (51.3%), while Hispanics in the Central portion of the U.S. are the least likely to take advantage of these savings (23.4%).

b. By Country Of Origin

Hispanics who cited Cuba as their country of origin are the heaviest users of Price-Off Store Coupons (47.5%).

1987
U.S. HISPANIC MARKET
PRICE-OFF COUPONS
INCIDENCE OF USAGE
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Yes	47.5%	40.3%	32.3%	32.1%
No	52.5	59.7	67.7	67.9
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Mexican-Americans are the second most frequent users of Price-Off Coupons (40.3%).

On the other hand, Hispanics from Puerto Rico as well as other Spanish-speaking countries register the lowest level of usage -- approximately 32% incidence of use each.

c. By Age

In general, as age increases, so does the usage of Price-Off Coupons.

1987
U.S. HISPANIC MARKET
PRICE-OFF COUPONS
INCIDENCE OF USAGE
BY AGE GROUP

	18-34	35-54	55+
Yes	35.3%	42.6%	38.4%
No	64.7	57.4	61.6
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

A total of 35.3% of the Hispanics 18 to 34 years of age indicated usage, compared to 42.6% of those 35 to 54 years of age and 38.4% of those 55+.

3. Frequency Of Coupon Usage

If Hispanics indicated that they used Price-Off Coupons, they were subsequently asked how often they do so.

a. By Market Region

One-fourth of all Hispanics who use Price-Off Coupons use them every time they shop.

1987
U.S. HISPANIC MARKET
PRICE-OFF COUPONS
FREQUENCY OF USE
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
Always	25.2%	27.7%	33.7%	15.3%	25.3%	22.7%
Sometimes	74.8	72.3	66.3	84.7	74.7	77.3
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Usage 100% of the time registers highest among Hispanics in the Southeast (33.7%). In comparison, only 15.3% of the Hispanics in the Central region "Always" use Price-Off Coupons.

b. By Country Of Origin

Thirty-five percent of the Cuban-Americans stated that they "Always" use Price-Off Coupons when making grocery purchases. A similar level (32.6%) was recorded by Puerto Rican-Americans.

1987
U.S. HISPANIC MARKET
PRICE-OFF COUPONS
FREQUENCY OF USE
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Always	34.7%	22.8%	32.6%	22.0%
Sometimes	65.3	77.2	67.4	78.0
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

A total of 22.8% of the Mexican-Americans who use Price-Off Coupons "Always" take advantage of their savings.

c. By Age

In general, the frequency of Money-Saving Coupon usage increases with age.

1987
U.S. HISPANIC MARKET
PRICE-OFF COUPONS
FREQUENCY OF USE
BY AGE GROUP

	18-34	35-54	55+
Always	20.8%	29.6%	28.4%
Sometimes	79.2	70.4	71.6
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Approximately 21% of the Hispanics 18 to 34 years of age use Price-Off Coupons whenever they go shopping, compared to 29% of those 35 years of age and older.

4. Types Of Coupons Used Most

Money-Saving Coupons can be obtained/clipped from various sources - through the mail, in/on product packages, newspapers, magazines, etc.

In order to see if any differences or similarities exist among U.S. Hispanics with relation to Money-Saving Coupon procurement, the question was posed, "What Type Of Cents-Off Coupons Do You Use Most Frequently?"

a. By Market Region

The most frequent type of Price-Off Coupon used by U.S. Hispanics is the kind that comes through the mail (54.5%). Thirty-four percent prefer clipping Coupons from newspapers.

Few Hispanics who use Price-Off Coupons use the kind that come in or on product packages (5.5%), or those that come in magazines (3.3%).

1987
U.S. HISPANIC MARKET
TYPE OF PRICE-OFF COUPONS
USED MOST FREQUENTLY
BY MARKET REGION

	Total	Northeast	Southeast	Central	Southwest	California
Received By Mail	54.5%	31.1%	71.8%	49.0%	58.2%	57.1%
From Newspapers	34.0	60.8	19.2	46.1	33.1	24.9
In/On Packages	5.5	0.0	0.0	4.9	5.7	9.8
From Magazines	3.3	1.9	1.2	0.0	2.3	6.0
In-Store	2.7	6.2	7.8	0.0	0.7	2.2
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

The usage of Price-Off Coupons which come via direct mail are used most often by Hispanics in the Southeast (71.8%) and least often by those in the Northeast (31.3%).

In contrast, Price-Off Coupons clipped from newspapers are more popular among Hispanics residing in the Northeast (60.8%); only 19.2% of the Hispanics in the Southeast region use newspaper Price-Off Coupons.

b. By Country Of Origin

Direct mail Price-Off Coupons are the most popular type among Hispanics of Cuban descent (70.6%). Comparatively, newspaper Coupons are favored by Puerto Rican-Americans (51.9%).

1987
U.S. HISPANIC MARKET
TYPE OF PRICE-OFF COUPONS
USED MOST FREQUENTLY
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Received By Mail	70.6%	56.3%	36.9%	49.0%
From Newspapers	17.2	31.4	51.9	42.5
In/On Packages	4.7	7.7	1.2	1.1
From Magazines	1.1	3.3	2.3	5.3
In-Store	6.4	1.3	7.7	2.1
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Mexican-Americans also favor redemption of Price-Off Coupons which are received through the mail (56.3%).

Forty-nine percent of the Hispanics from other Spanish-speaking countries use Price-Off Coupons that come in the mail most often, while 43% also utilize newspaper-clipped Coupons.

c. By Age

Older Hispanics (55+) are the heaviest users of direct mail Price-Off Coupons (61.5%). Fifty-three percent of all Hispanics 18 to 54 years of age also redeem these types of Money-Saving Coupons most often.

1987
U.S. HISPANIC MARKET
TYPE OF PRICE-OFF COUPONS
USED MOST FREQUENTLY
BY AGE GROUP

	18-34	35-54	55+
Received By Mail	53.0%	52.9%	61.5%
From Newspapers	34.0	37.4	27.4
In/On Packages	7.1	3.5	5.3
From Magazines	3.2	2.9	4.2
In-Store	2.7	3.3	1.6
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

A total of 27.4% of the 55 years of age and older U.S. Hispanics clip Price-Off Coupons from newspapers, compared to 34% of 18 to 34 year old Hispanics, and 37% of 35 to 54 year old Hispanics.

XII. DEPARTMENT STORE PATRONAGE

XII. DEPARTMENT STORE PATRONAGE

Hispanics were asked how frequently they patronize Department Stores.

1. By Market Region

Department Store patronage is highest in the Southeast. Approximately 20% of the Southeast Hispanics frequent a Department Store more than once a week; an additional 22.7% shop approximately once a week.

1987
U.S. HISPANIC MARKET
FREQUENCY OF SHOPPING AT DEPARTMENT STORES
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
More Than Once A Week	10.7%	8.1%	19.7%	10.0%	10.1%	10.5%
Once A Week	19.8	15.5	22.7	27.5	24.9	15.7
Twice A Month	17.9	17.9	11.8	26.8	21.2	15.6
Once A Month	25.5	20.9	25.5	16.6	23.4	31.1
Less Than Once A Month	25.7	36.6	20.3	19.1	19.8	27.1
Don't Know	0.4	1.0	0.0	0.0	0.6	0.0
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average Number Of Visits Per Month	2.1	1.8	2.5	2.4	2.3	1.9

Source: Strategy Research Corporation

Overall, frequency of patronage is lowest in the Northeast and California regions where Hispanics shop at Department Stores on the average of 1.8 and 1.9 times a month, respectively.

2. By Country Of Origin

In general, there are no differences recorded with regard to country of origin or descent when it comes to the frequency of Department Store patronage. All Hispanic-Americans shop at a Department Store on the average of two times per month.

1987
U.S. HISPANIC MARKET
FREQUENCY OF SHOPPING AT DEPARTMENT STORES BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
More Than Once A Week	15.9%	9.4%	10.6%	12.3%
Once A Week	16.0	22.4	18.2	14.6
Twice A Month	12.6	17.0	20.9	20.1
Once A Month	30.9	27.8	16.2	24.2
Less Than Once A Month	24.6	23.1	32.8	28.8
Don't Know	0.0	0.3	1.3	0.0
TOTAL	100.0%	100.0%	100.0%	100.0%
Average Number Of Visits Per Month	2.1	2.1	2.0	2.0

Source: Strategy Research Corporation

Department Store patronage of more than once a week registered highest among Cuban-Americans (15.9%). Most Mexican-Americans (27.8%) stated that they shop at Department Stores once a month. Most Puerto Rican-Americans (32.8%) and Other Hispanics (28.8%), however, stated that they frequent Department Stores less than once a month.

3. By Age

Shopping at Department Stores is more popular among younger Hispanics. Those 18 to 34 years of age, as well as those 35 to 54 years of age, average 2.2 and 2.1 visits per month, respectively. In comparison, older Hispanics (55+) average 1.7 visits per month.

1987
U.S. HISPANIC MARKET
FREQUENCY OF SHOPPING AT DEPARTMENT STORES BY AGE GROUP

	18-34	35-54	55+
More Than Once A Week	12.1%	11.8%	4.6%
Once A Week	20.7	19.6	17.5
Twice A Week	22.7	14.2	10.8
Once A Month	23.5	27.4	28.1
Less Than Once A Month	20.8	27.0	37.4
Don't Know	0.2	0.0	1.6
TOTAL	100.0%	100.0%	100.0%
Average Number Of Visits Per Month	2.7	2.1	1.7

Source: Strategy Research Corporation

Approximately 12% of the Hispanics 18 to 34 and those 35 to 54 years of age patronize a Department Store more than once a week, compared to 4.6% of those 55 and older.

Slightly more than one-third (37.4%) of the Hispanics 55 years of age and older frequent a Department Store less than once a month; a 20.8% level was recorded among Hispanics 18 to 34 years of age.

XIII. SHOPPING PREFERENCES

XIII. SHOPPING PREFERENCES

In order to better understand the Hispanic consumer's attitudes and preferences toward Hispanic versus non-Hispanic oriented retail outlets, Hispanics were asked to rate the importance to them of the following when shopping:

- Spanish-speaking employees
- English-speaking employees
- Hispanic-origin employees
- Spanish store signs/advertisements
- A store which sells products that Hispanics like

In order to measure the preferences which U.S. Hispanics have when shopping, they were asked to state their degree of agreement for each of the aforementioned attributes. A ten point rating scale was utilized whereby a number "1" represented a rating of "Not At All Important" and a number "10" signified a "Very Important" rating.

Specifically, Hispanics were asked, "Now we are going to use a scale from one (1) to ten (10). A number one (1) means that the statement I am going to read to you is "Not At All Important" to you when shopping. A number ten (10) means that the statement I am going to read to you is "Very Important" to you when shopping for goods and services. You need not rate each statement a one (1) or a ten (10), but rather you may choose any number in between. Only keep in mind that the higher the rating you give, the more important the statement is to you, and the lower the numeric rating you give, the less important the statement is to you. How important to you is the following phrase. . . ?"

1. By Market Region

Overall, it is very important to the U.S. Hispanic that the store in which he/she shops "Sells Products Geared Toward Hispanic Tastes" (7.63 mean average rating). On the other hand, U.S. Hispanics place a lesser degree of importance on the fact that "Employees Speak English" (5.07 mean average rating).

1987
U.S. HISPANIC MARKET
IMPORTANCE TO HISPANICS OF SALES PEOPLE AND STORES
WEIGHTED AVERAGES
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
Store Sell Products Geared To Hispanic Tastes	7.63	8.47	8.24	8.57	6.95	7.45
Sales People Speak Spanish	6.87	7.01	7.53	7.92	6.41	6.98
Signs/Ads In Store Be In Spanish	6.75	7.41	7.85	7.62	5.78	6.90
Sales People Be Hispanic	6.69	7.31	7.94	7.59	6.08	6.55
Sales People Speak English	5.07	5.29	4.18	6.86	5.31	4.69

Source: Strategy Research Corporation

In the Central region, more so than in other regional areas, more importance is placed on stores that "Sell Products Geared Toward Hispanic Tastes" (8.57 weighted average). In the Southwest, on the other hand, this aspect is of lesser importance (6.95 mean average rating).

Similarly, it is also important to Hispanics in the Central region that "Sales People Speak Spanish" (7.92 average rating); in the Southwest this is not as important (6.11 mean average rating).

It is more important to Hispanics living in the Southeast that "Store Signs/Ads Be In Spanish" (7.85); while in the Southwest, Hispanics do not find this to be a very important factor (5.78 mean average rating).

2. By Country Of Origin

For Hispanics, no matter what their country of origin, it is very important that the stores in which they shop "Sell Products Geared Toward Hispanic Tastes."

On the other hand, Hispanics, whether they are Cuban, Mexican, Puerto Rican, or some other nationality, place a lesser degree of importance on the fact that the store "Employees Speak English."

1987
U.S. HISPANIC MARKET
IMPORTANCE TO HISPANICS OF SALES PEOPLE AND STORES
WEIGHTED AVERAGES
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Stores Sell Products Geared To Hispanic Tastes	8.06	7.40	8.55	7.57
Sales People Speak Spanish	7.40	6.84	6.61	7.06
Signs/Ads In Store Be In Spanish	7.50	6.45	7.03	7.25
Sales People Be Hispanic	7.56	6.36	7.16	7.04
Sales People Speak English	4.25	4.96	5.57	5.32

Source: Strategy Research Corporation

Hispanics whose country of origin is Cuba place more importance on "Store Personnel Who Are Hispanic," "Sales People Who Speak Spanish," and that "Store Signs/Ads Are In Spanish" than do Mexican-Americans, Puerto Rican-Americans or Other Hispanic-Americans.

3. By Age

Among Hispanics in the older, 55+ age group, it is very important that the store in which they shop "Sells Products Geared Toward Hispanic Tastes" and that "Sales People Speak Spanish" (8.00 and 7.40 mean average scores, respectively). It is also more important to the Hispanics 55 years of age and older than to their younger counterparts that the "Sales People Be Hispanic" and that the "Store Signs/Ads Be In Spanish" (7.26 and 7.38 mean average ratings, respectively).

1987
U.S. HISPANIC MARKET
IMPORTANCE TO HISPANICS OF SALES PEOPLE AND STORES
WEIGHTED AVERAGES
BY AGE GROUP

	18-34	35-54	55+
Stores Sell Products Geared To Hispanic Tastes	7.48	7.66	8.00
Sales People Speak Spanish	6.70	6.86	7.40
Signs/Ads In Store Be In Spanish	6.62	6.61	7.38
Sales People Be Hispanics	6.56	6.57	7.26
Sales People Speak English	5.31	5.01	4.49

Source: Strategy Research Corporation

Younger Hispanics (18 to 34 years of age) place a lesser degree of importance on "Sales People Who Speak Spanish" than do the older 35+ age groups.

XIV. BRAND PERCEPTIONS

XIV. BRAND PERCEPTIONS

The attitudes and perceptions of U.S. Hispanics toward brand name products were explored. Specifically, Hispanics were queried with regard to the following six brand-related concept statements:

- "I Don't Buy Brands I Have Never Heard Of, Even If They Cost Less"
- "When Shopping, I Consider Brands/Companies Which Have Shown Interest And Really Appreciate The Hispanic Consumer"
- "Nationally Advertised And Popular Name Brands Are Superior In Quality To Store Brands"
- "Nationally Advertised And Popular Name Brands Are The Best Products For My Family"
- "The Most Reliable And Best Products Are Made By American Companies"
- "The Popular Name Brands I Use Most Often Today Are Going To Be The Same Brands I Will Be Using Next Year"

In order to measure the attitudes and perceptions that Hispanics have toward brand name products, surveyed respondents were asked to state their degree of agreement for each of the aforementioned concept statements. A five-point rating scale was used ranging from "1 - Totally Disagree" to "5 - Completely Agree."

Specifically, Hispanics were asked, "Now we are going to use a scale from one (1) to five (5). A number one (1) means that you totally disagree with the statement I am going to read. A number five (5) means that you totally agree with the statement I am going to read to you. You need not rate each statement a one (1) or a five (5), but rather you may choose any number in between such as a two (2), three (3) or four (4). Only keep in mind that the higher the rating you give, the more you are in agreement with the statement, and the lower the numeric rating you give, the more you disagree with the statement. How much do you agree with the following phrase. . .?"

Overall, U. S. Hispanics agree most with, "The Most Reliable And Best Made Products Are Made By American Companies" (a 3.81 mean average rating was recorded).

Second in importance is the brand-related concept statement, "When Shopping, I Consider Brands/Companies Which Have Shown Interest And Really Appreciate The Hispanic Consumer" (3.70 mean average rating).

SUMMARY
TOTAL U.S. HISPANICS

	Mean Average Rating
"The Most Reliable And Best Products Are Made By American Companies"	3.81
"When Shopping, I Consider Brands/Companies Which Have Shown Interest And Really Appreciate The Hispanic Consumer"	3.70
"Nationally Advertised And Popular Name Brands Are Superior In Quality To Store Brands"	3.58
"Nationally Advertised And Popular Name Brands Are The Best Products For My Family"	3.56
"I Don't Buy Brands I Have Never Heard Of, Even If They Cost Less"	3.32
"The Popular Name Brands I Use Most Often Today Are Going To Be The Same Brands I Will Be Using Next Year"	3.28

Hispanics are brand conscious. The concept which received the third highest mean average rating (3.58) was, "Nationally Advertised And Popular Name Brands Are Superior In Quality To Store Brands." Similarly, the fourth ranked statement, "Nationally Advertised And Popular Name Brands Are The Best Products For My Family" received a mean average rating of 3.56.

The brand-related statement, "I Don't Buy Brands I Have Never Heard Of, Even If They Cost Less" recorded an overall mean average of 3.32.

1. "I Don't Buy Brands I Have Never Heard Of, Even If They Cost Less"

a. By Market Region

Overall, almost one-half of all U.S. Hispanics do not purchase unfamiliar brands, regardless of whether the products cost less. Specifically, 48.6% of the respondents assigned values of "4" or "5" to this statement. Geographically, this opinion is most strongly felt by Hispanics residing in the Southeast and California regions (51.0% and 57.0% levels of agreement, respectively).

1987
U.S HISPANIC MARKET
"I DON'T BUY BRANDS I HAVE NEVER HEARD OF, EVEN IF THEY COST LESS"

		Total	North-east	South-east	Central	South-west	California
Totally Disagree	1	18.8%	31.5%	15.3%	15.3%	21.6%	11.4%
	2	12.2	12.5	5.4	36.8	17.4	6.4
	3	20.4	11.0	28.3	41.5	15.7	25.2
	4	14.8	7.2	27.0	0.0	10.0	21.0
Totally Agree	5	33.8	37.8	24.0	6.4	35.3	36.0
TOTAL		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Weighted Average		3.32	3.07	3.39	2.46	3.20	3.64

Source: Strategy Research Corporation

Hispanics living in the Central portion of the United States, however, have a much greater tendency of purchasing new brands if they cost less than competitive ones; only 6.4% claim to be brand loyal.

b. By Country Of Origin

Hispanic-Americans from countries other than Cuba, Mexico or Puerto Rico tend to be the most brand loyal. A total of 63.9% agreed (an assigned value of "4" or "5") that they do not purchase products/brands just because they are lower in price; a mean average rating of 3.70 was registered.

Mexican-Americans are the second most brand loyal group among U.S. Hispanics. A total of 45.3% agreed that they would not buy an unfamiliar brand (3.82 mean rating).

1987
U.S. HISPANIC MARKET
"I DON'T BUY BRANDS I HAVE NEVER
HEARD OF, EVEN IF THEY COST LESS"

		Country Of Origin			
		Cuba	Mexico	Puerto Rico	Other
Totally Disagree	1	33.2%	15.3%	36.4%	15.5%
	2	1.5	15.3	16.6	6.3
	3	22.4	24.1	9.4	14.3
	4	29.7	12.9	1.1	20.0
Totally Agree	5	13.2	32.4	36.5	43.9
TOTAL		100.0%	100.0%	100.0%	100.0%
Weighted Average		2.88	3.32	2.85	3.70

Source: Strategy Research Corporation

Conversely, Cuban-Americans and Puerto Rican-Americans show a greater tendency of brand switching if a price factor is involved (mean average ratings of 2.88 and 2.85, respectively).

2. "When Shopping, I Consider Brands/Companies Which Have Shown Interest And Really Appreciate The Hispanic Consumer"

a. By Market Region

Brands/companies which have shown interest in the Hispanic consumer strongly motivate (an assigned value of "5") 40.8% of U.S. Hispanics to purchase brands/products manufactured by those companies.

1987
U.S. HISPANIC MARKET
"WHEN SHOPPING, I CONSIDER BRANDS/COMPANIES WHICH HAVE SHOWN INTEREST AND REALLY APPRECIATE THE HISPANIC CONSUMER"

		Total	Northeast	Southeast	Central	Southwest	California
Totally Disagree	1	11.9%	11.2%	10.9%	0.7%	6.1%	18.2%
	2	6.4	9.2	1.1	4.8	11.5	1.7
	3	22.3	4.7	12.0	54.8	20.2	30.2
	4	18.6	14.9	10.9	31.3	25.1	15.7
Totally Agree	5	40.8	60.0	65.1	8.4	37.1	34.2
TOTAL		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Weighted Average		3.70	4.03	4.18	3.42	3.75	3.46

Source: Strategy Research Corporation

Companies which indicate an interest in the U.S. Hispanic community fully capture the attention and increase purchase intent of at least six out of ten Hispanics who reside in the Northeast and Southeast regions (4.03 and 4.18 mean average ratings, respectively). However, only 8.4% of Hispanics living in the Central region consider this a very important factor (a mean average rating of 3.42).

b. By Country Of Origin

Sixty-seven percent of Hispanics who cited Cuba as their country of origin or descent are in total agreement with the concept, "When Shopping, I Consider Brands/Companies Which Have Shown Interest And Really Appreciate The Hispanic Consumer." Cuban-Americans are the Hispanics most in accordance with this loyalty concept as a 4.31 mean average rating was recorded.

1987
U.S. HISPANIC MARKET
"WHEN SHOPPING, I CONSIDER BRANDS/COMPANIES
WHICH HAVE SHOWN INTEREST AND REALLY APPRECIATE
THE HISPANIC CONSUMER"

		Country Of Origin			
		Cuba	Mexico	Puerto Rico	Other
Totally Disagree	1	7.3%	13.4%	6.3%	13.2%
	2	1.3	6.5	7.8	6.8
	3	11.0	26.6	18.2	17.1
	4	13.6	19.5	20.3	16.6
Totally Agree	5	66.8	34.0	47.4	46.3
TOTAL		100.0%	100.0%	100.0%	100.0%
Weighted Average		4.31	3.54	3.95	3.76

Source: Strategy Research Corporation

Mexican-Americans represent the opposite end of the spectrum. They show the least degree of agreement (3.54 weighted average) with this concept statement.

3. "Nationally Advertised And Popular Name Brands Are Superior In Quality To Store Brands"

a. By Market Region

Overall, one-third (35.1%) of U.S. Hispanics "Totally Agree" that nationally advertised and popular name brands are superior in quality to store brands.

1987
U.S. HISPANIC MARKET
"NATIONALLY ADVERTISED AND POPULAR NAME BRANDS ARE SUPERIOR IN QUALITY TO STORE BRANDS"

		Total	North-east	South-east	Central	South-west	California
Totally Disagree	1	12.5%	22.7%	10.1%	0.7%	14.1%	8.3%
	2	6.9	6.0	5.1	23.6	7.8	3.3
	3	25.5	20.1	18.0	40.7	25.6	28.7
	4	20.0	12.5	13.0	31.5	23.1	21.5
Totally Agree	5	35.1	38.7	53.8	3.5	29.4	38.2
TOTAL		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Weighted Average		3.58	3.39	3.95	3.14	3.46	3.78

Source: Strategy Research Corporation

The "Totally Agree" opinion is shared by the majority (53.8%) of Hispanics residing in the Southeast region; yet a "Totally Agree" response is rendered by only 3.5% of the Central region Hispanics. The mean average ratings registered for these two regions are 3.95 (Southeast) versus 3.14 (Central).

b. Country Of Origin

More than one-half (55.5%) of Cuban-Americans "Totally Agree" that nationally advertised brands are the best (3.95 mean average rating).

1987
U.S. HISPANIC MARKET
"NATIONALLY ADVERTISED AND POPULAR NAME BRANDS ARE SUPERIOR IN QUALITY TO STORE BRANDS"

		Country Of Origin			
		Cuba	Mexico	Puerto Rico	Other
Totally Disagree	1	9.9%	11.3%	23.8%	8.4%
	2	3.6	6.6	9.5	6.4
	3	23.6	27.6	22.3	23.0
	4	7.4	20.2	19.8	23.2
Totally Agree	5	55.5	34.3	24.6	39.0
TOTAL		100.0%	100.0%	100.0%	100.0%
Weighted Average		3.95	3.59	3.12	3.78

Source: Strategy Research Corporation

Meanwhile, 23.8% of Puerto Rican-Americans "Totally Disagree" that nationally advertised and popular name brands are superior in quality to store brands (3.12 mean average rating).

4. "Nationally Advertised And Popular Name Brands Are The Best Products For My Family"

a. By Market Region

Over one-third (37.9%) of U.S. Hispanics "Totally Agree" that nationally advertised and popular name brands are the best products for their family. This opinion is most strongly felt by Hispanics residing in the Southwest portion of the United States (48.6%).

1987
U.S. HISPANIC MARKET
"NATIONALLY ADVERTISED AND POPULAR BRANDS
ARE THE BEST PRODUCTS FOR MY FAMILY"

		Total	North-east	South-east	Central	South-west	California
Totally Disagree	1	13.8%	16.3%	21.2%	15.2%	8.0%	16.1%
	2	11.2	18.7	3.7	34.2	11.7	4.0
	3	18.5	16.5	18.8	26.5	21.5	14.8
	4	18.6	12.2	11.1	0.0	10.2	32.9
Totally Agree	5	37.9	36.3	45.2	24.1	48.6	32.2
TOTAL		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Weighted Average		3.56	3.33	3.55	2.84	3.80	3.61

Source: Strategy Research Corporation

Hispanics living in the Central states record the lowest level of agreement; 24.1% of Central region Hispanics feel that nationally advertised and popular name brand products are the best for their family. The Central region, in this regard, records a mean average rating of 2.84 for this brand-related concept statement.

b. By Country Of Origin

Cuban-Americans are the least likely to purchase nationally advertised or popular name brands for their families (2.90 mean average); however, 25.3% do purchase popular brands.

1987
U.S. HISPANIC MARKET
"NATIONALLY ADVERTISED AND POPULAR BRANDS ARE THE BEST PRODUCTS FOR MY FAMILY"

		Country Of Origin			
		Cuba	Mexico	Puerto Rico	Other
Totally Disagree	1	38.1%	12.3%	18.0%	7.0%
	2	3.3	11.1	27.2	7.5
	3	13.9	21.3	13.0	15.1
	4	19.4	20.2	6.0	19.3
Totally Agree	5	25.3	35.1	35.8	51.1
TOTAL		100.0%	100.0%	100.0%	100.0%
Weighted Average		2.90	3.55	3.14	4.00

Source: Strategy Research Corporation

The great majority (70.4%) of Other Hispanic-Americans agree to purchasing well-known products/brands for their family. Specifically, 51.1% of the respondents assigned a value of "5" to this brand-related statement, while 19.3% assigned a value of "4". With these high levels of agreement, a 4.00 mean average rating was recorded for Other Hispanic-Americans.

5. "The Most Reliable And Best Products Are Made By American Companies"

a. By Market Region

When it comes to product purchase, 45.5% of all U.S. Hispanics fully believe that American-made products are the best.

1987
U.S. HISPANIC MARKET
"THE MOST RELIABLE AND BEST PRODUCTS
ARE MADE BY AMERICAN COMPANIES"

		Total	Northeast	Southeast	Central	Southwest	California
Totally Disagree	1	8.9%	8.7%	4.0%	2.0%	5.0%	13.8%
	2	9.6	21.6	0.0	15.0	12.0	3.1
	3	19.2	12.3	24.2	40.6	23.2	15.6
	4	16.8	9.0	1.5	38.2	10.9	25.7
Totally Agree	5	45.5	48.4	70.3	4.2	48.9	41.8
TOTAL		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Weighted Average		3.81	3.67	4.34	3.27	3.87	3.79

Source: Strategy Research Corporation

American-made products are thought to be the most reliable and the best made by seven out of ten Hispanics (70.3%) in the Southeast region (4.34 mean average rating overall). Although a 3.27 mean average rating was recorded, Hispanics in the Central region registered the least level of "Total Agreement" with this specific concept statement (4.2%).

b. By Country Of Origin

Fully three-fourths of all Cuban-Americans believe that American-made products are the best; 74.8% assigned a value of "5" to this brand-related concept statement.

1987
U.S. HISPANIC MARKET
"THE MOST RELIABLE AND BEST PRODUCTS ARE MADE BY AMERICAN COMPANIES"

		Country Of Origin			
		Cuba	Mexico	Puerto Rico	Other
Totally Disagree	1	0.0%	9.6%	4.6%	12.2%
	2	8.9	8.0	14.7	10.4
	3	16.3	19.9	27.2	12.6
	4	0.0	17.7	16.2	20.0
Totally Agree	5	74.8	44.8	37.3	44.8
TOTAL		100.0%	100.0%	100.0%	100.0%
Weighted Average		4.41	3.80	3.67	3.75

Source: Strategy Research Corporation

Total agreement with the reliability and quality of domestic-made goods is held by 44.8% of Hispanics of Mexican background; a similar level was recorded by Other Hispanic-Americans.

Over one-third (37.3%) of Puerto Rican-Americans "Totally Agree" that American-made products are superior.

6. "The Popular Name Brands I Use Most Often Today Are Going To Be The Same Brands I Will Be Using Next Year"

a. By Market Region

Almost one-half (45.8%) of all U.S. Hispanics can be considered brand loyal, that is, they gave scores of "4" or "5" to this statement.

1987
U.S. HISPANIC MARKET
"THE POPULAR NAME BRANDS I USE MOST OFTEN TODAY ARE GOING TO BE THE SAME BRANDS I WILL BE USING NEXT YEAR"

		Total	North-east	South-east	Central	South-west	California
Totally Disagree	1	16.9%	19.9%	19.4%	15.2%	19.2%	13.7%
	2	10.6	3.3	4.6	13.0	12.0	12.3
	3	26.7	10.8	39.7	48.1	26.5	29.2
	4	19.1	23.0	9.4	8.6	11.1	27.0
Totally Agree	5	26.7	43.0	26.9	15.1	31.2	17.8
TOTAL		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Weighted Average		3.28	3.66	3.20	2.95	3.23	3.23

Source: Strategy Research Corporation

Hispanics residing in the Central region indicate a much lesser degree of brand loyalty than those in the Northeast (mean average of 2.95 versus 3.66, respectively).

b. By Country Of Origin

Hispanics from Spanish-speaking countries other than Cuba, Mexico or Puerto Rico express the greatest intention of using the same brand name products in the future which they are using today (3.52 mean average).

1987
U.S. HISPANIC MARKET
"THE POPULAR NAME BRANDS I USE MOST OFTEN TODAY
ARE GOING TO BE THE SAME BRANDS I WILL BE USING NEXT YEAR"

		Country Of Origin			
		Cuba	Mexico	Puerto Rico	Other
Totally Disagree	1	20.2%	14.5%	25.9%	17.7%
	2	7.6	13.8	8.2	4.5
	3	50.1	28.8	4.2	22.1
	4	16.4	19.0	21.9	19.0
Totally Agree	5	5.7	23.9	39.8	36.7
TOTAL		100.0%	100.0%	100.0%	100.0%
Weighted Average		2.80	3.24	3.42	3.52

Source: Strategy Research Corporation

A total of 39.8% of Puerto Rican-Americans and 23.9% of Mexican-Americans also show a strong level of brand loyalty (3.42 and 3.24 mean average ratings, respectively).

The data indicates that Cuban-Americans are the least likely to remain loyal to one brand. Six percent "Totally Agreed" that in one year they would be using the same brands that they use today (2.80 mean average rating).

XV. PRODUCT USAGE

XV. PRODUCT USAGE

The Hispanic family spends almost one-fourth more of its income in grocery stores than does the non-Hispanic family. Thus, a substantial part of their disposable income will be spent on grocery items. Furthermore, the average Hispanic family also spends more than the non-Hispanic family for packaged goods. The majority of Hispanic consumer purchases are in the areas of food, beverage and clothing. Hispanic consumers are an excellent target audience for marketers since they spend a disproportionately high percentage of their income on packaged goods.

As a consumer group, Hispanics are very brand conscious. Brand awareness, brand loyalty and appreciation of quality products are important factors in the Hispanic's purchasing decisions. Brand identity and loyalty are traced, in part, to the Hispanic's need to identify with recognized brands and associated product quality that signify "the best" is being provided to their family. It also reduces the anxiety of making a wrong decision and wasting money, particularly where language comprehension may be a problem.

Given the importance of the family in Hispanic culture, it should not be surprising to find that the Hispanic places product reputation and quality ahead of price.

When first arriving in the U.S., many new immigrants do not recognize "familiar" products and thus have to adjust to new brand selection. When an acceptable brand is found, shoppers usually stay with this brand as their "original" brand for several years. Thus, loyalty is high among new arrivals.

Most Hispanic food store shopping is done in major supermarkets. Many of the major supermarket chains maintain outlets in Hispanic areas and actively cater to the Hispanic trade. However, while most Hispanic shoppers do use major supermarkets as their primary food stores, "bodegas" (small neighborhood grocery stores) serve as secondary stores and are quite important in distribution. Additional small neighborhood stores, such as Hispanic butcher shops and bakeries, supplement the primary stores.

Hispanic shopping patterns are conditioned by the need for feeling culturally welcome, by the store personnel and by the products offered. The buying habits of the Hispanic in terms of brand preference are substantially influenced by the importance that the advertiser places on addressing the Hispanic.

The following is data pertaining to the incidence of usage for a wide array of products among Hispanic and non-Hispanic consumers.

A. HISPANIC AND NON-HISPANIC HOUSEHOLD USAGE

Usage incidence for a wide array of products is presented by total market for Hispanic and non-Hispanic product usage. In order to further analyze the data, a Hispanic to non-Hispanic usage index is shown. An index of 100 indicates that Hispanic percent incidence and non-Hispanic incidence are identical. An index above 100 indicates that incidence among Hispanic households is higher than non-Hispanic households.

1. Food and Beverage Items

Many Food and Beverage products are found to index higher for the U.S. Hispanic population. These products include Baby Food-Jar/Instant, Chewing Gum, Hot Breakfast Cereals, Ground Coffee-Latin Style, Instnat/Freeze Dried Coffee, Crackers, Frankfuters/Weiners, Frozen Fruit Bars/Pops, Frozen Ice Cream Bars/Pops, Canned Luncheon Meats, Powdered/Liquid Milk Additives, Shortening, Drinks-Children's Powdered, Fruit Nectars, Malt Liquor, Tequila, Olive Oil, Soft Drinks-Regular, Spaghetti-Canned, Spaghetti Sauce, and Tomato Sauce-Canned/Bottled.

Among the Food and Beverage items surveyed, the products receiving the highest indices for Hispanics were Baby Food-Jar/Instant, Spaghetti-Canned, Fruit Nectars, and Frozen Fruit Bars/Pop.

1987
INCIDENCE OF USE
HISPANIC AND NON-HISPANIC HOUSEHOLDS
FOOD AND BEVERAGE ITEMS
USE INDEX

	Total Hispanics	Total Non-Hispanics	Use Index Hispanic To Non-Hispanic
Baby Food-Jar/Instant	31.3%	7.4%	423
Barbecue Sauce	60.5	59.4	102
Breakfast Cereal-Cold	88.6	83.7	106
Breakfast Cereal-Hot	53.1	57.2	110
Candy Bars	56.7	54.6	104
Cheese-Sliced/Processed	78.1	73.0	107
Chewing Gum	71.4	63.1	113
Coffee-Instant/Freeze Dried	71.5	64.6	111
Coffee-Ground-American Style	62.2	69.8	89
Coffee-Ground-Latin Style	54.2	4.9	111
Crackers	86.5	79.7	109
Drinks-Children's Powdered	50.2	29.8	168
Frankfurters/Weiners/Hot Dogs	74.4	59.4	125
Flour	72.0	71.4	101
Frozen Dinners	32.0	31.1	103
Frozen Fruit Bars/Pops	74.9	28.6	262
Frozen Ice Cream Bars/Pops	69.2	49.5	140
Frozen Pizza	37.8	30.2	125
Fruit Juice-Chilled/Bottled	69.7	62.2	112
Fruit Juice-Frozen	65.9	66.3	99
Fruit Nectars	65.3	16.5	396
Ketchup	95.5	85.4	112
Luncheon Meats-Canned	39.4	27.7	142
Luncheon Meats-Pre-packaged	66.6	52.4	127
Margarine	88.3	70.0	126
Mayonnaise	96.0	88.0	109
Milk-Canned/Evaporated	51.7	34.6	149
Milk-Powdered Liquid Additives	63.1	34.3	184

Continued. . .

1987
INCIDENCE OF USE
HISPANIC AND NON-HISPANIC HOUSEHOLDS
FOOD AND BEVERAGE ITEMS
USE INDEX
(Continued)

	Total Hispanics	Total Non-Hispanics	Use Index Hispanic To Non-Hispanic
Mustard	71.1%	82.2%	86
Non-Stick Cooking Products - Aerosol	22.5	26.6	85
Oil-Liquid Cooking And Salad	90.0	82.9	109
Olive Oil	48.4	42.3	114
Peanut Butter	53.7	79.7	67
Potato Chips	77.9	72.5	107
Salad Dressing - Dry Mix/ Prepared	61.2	73.7	83
Shortening	51.7	36.0	144
Soft Drinks - Regular	93.0	73.1	114
Soft Drinks - Lemon Lime	69.9	51.5	136
Soft Drinks - Orange	52.5	50.1	125
Soup - Canned	65.7	71.1	92
Soup - Dry/Instant	70.7	59.9	118
Spaghetti/Noodles - Dry	84.4	80.7	105
Spaghetti - Canned	41.9	21.0	200
Spaghetti Sauce	70.8	60.0	118
Tea	63.0	74.0	85
Tomato Paste - Canned	80.8	72.0	112
Tomato Sauce - Canned/Bottled	89.8	69.3	130
Tuna	73.6	83.3	88
Vegetables - Canned	67.6	67.5	100
Vegetables - Frozen	42.0	65.1	65
Yogurt	48.8	59.3	82

Continued. . .

1987
INCIDENCE OF USE
HISPANIC AND NON-HISPANIC HOUSEHOLDS
FOOD AND BEVERAGE ITEMS
USE INDEX

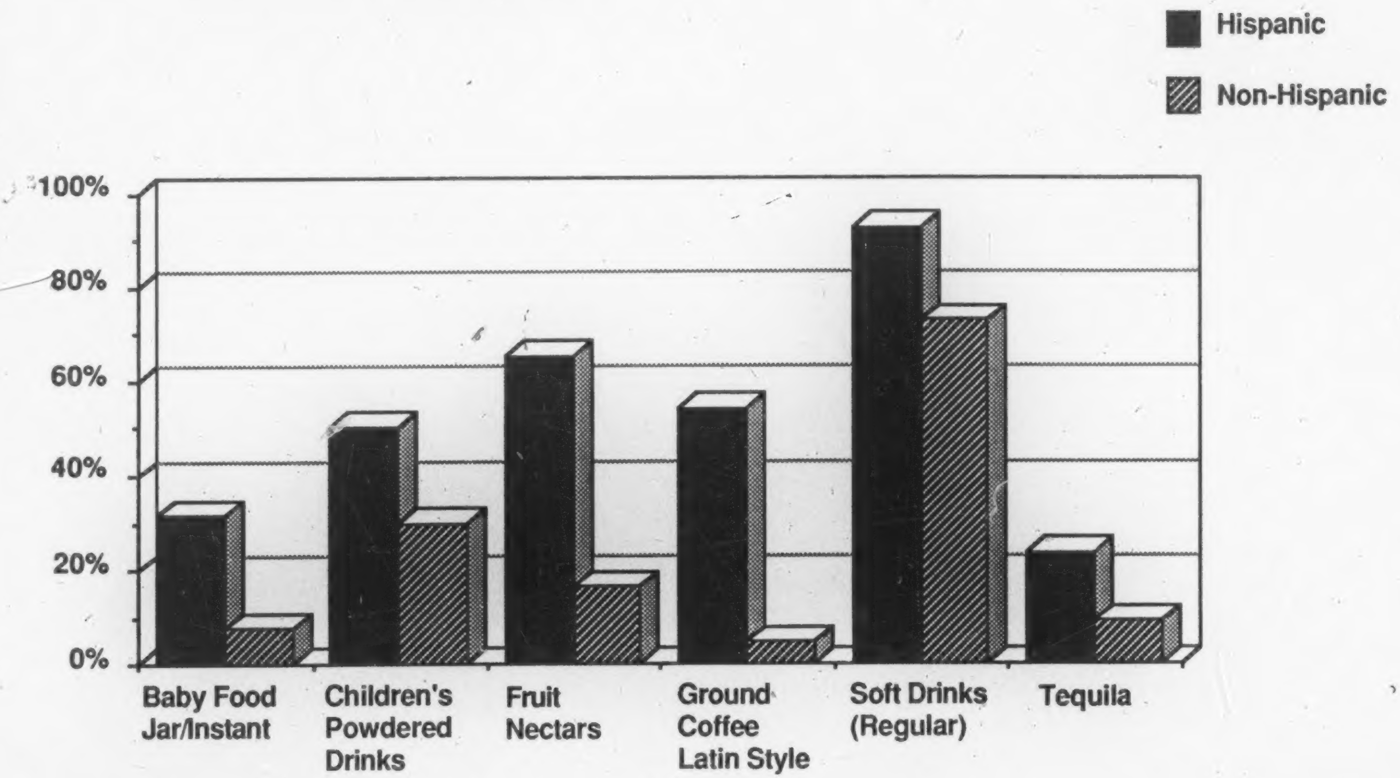
(Continued)

	Total Hispanics	Total Non-Hispanics	Use Index Hispanic To Non-Hispanic
Beer Regular	61.5%	45.9%	134
Beer - Malt Liquor	12.5	6.8	184
Brandy/Cognac	21.5	26.1	82
Rum	24.3	25.0	97
Scotch/Blended Whisky	26.2	23.9	110
Tequila	23.6	9.0	262
Wine Coolers	27.1	20.7	131

Source: Strategy Research Corporation

1987
Incidence of Use

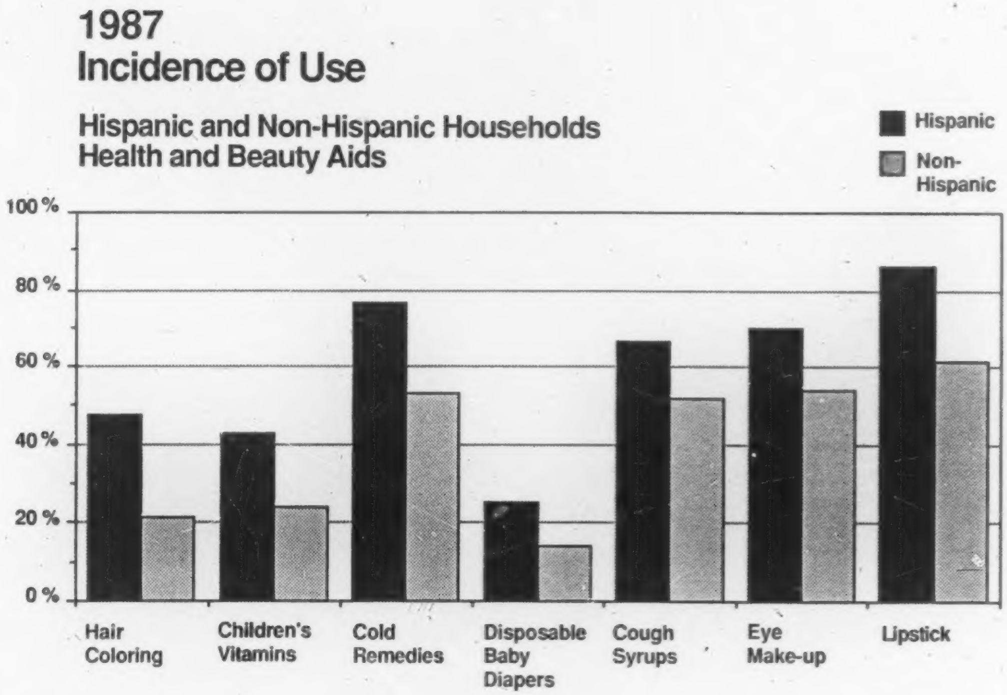
Hispanic and Non-Hispanic Households Food and Beverage Items.



Source: Strategy Research Corporation

2. Health and Beauty Aids

Hispanic households demonstrate a higher product usage index for the majority of Health and Beauty Aid products surveyed. The products registering the highest index for Hispanic households are Cold Remedies, Cream Rinse/Conditioner, Disposable Baby Diapers, Hair Coloring, and Laxatives, Pre-moistened Cleansing Wipes and Children's Vitamins.



Source: Strategy Research Corporation

1987
INCIDENCE OF USE
HISPANIC AND NON-HISPANIC HOUSEHOLDS
HEALTH AND BEAUTY AIDS
USE INDEX

	Total Hispanics	Total Non-Hispanics	Use Index Hispanic To Non-Hispanic
After Shave Lotion (Males)	81.4%	71.2%	114
Bath/Bar Soap	98.8	96.2	103
Cold Remedies - Liquid	76.7	53.2	144
Cold Remedies - Tablets	75.2	52.2	144
Cough Syrup	67.1	52.1	129
Cream Rinse/Conditioner	77.4	51.6	150
Deodorant	97.4	93.0	105
Disposable Baby Diapers	25.3	14.3	179
Electric Razors (Men)	30.6	29.3	104
Eye Make-Up (Females)	70.2	54.0	130
Face Cream/Lotion/ Moisturizer	81.8	70.9	115
Facial Tissues	75.4	84.7	89
Hair Coloring (Females)	47.6	21.4	222
Hair Spray (Females)	50.1	53.3	94
Hand and Body Lotion	85.5	77.4	110
Headache Remedies/ Pain Killers	94.3	80.3	117
Indigestion/Upset Stomach Remedies	85.1	68.7	124
Laxatives	48.6	29.6	164
Lipstick (Females)	85.6	61.4	139
Mouthwash	76.9	76.5	101
Nail Polish (Females)	84.7	58.4	145
Panty Hose (Females)	74.3	79.7	93
Perfume/Cologne (Females)	92.4	81.6	113
Pre-Moistened Cleansing Wipes	37.9	13.1	289
Razor Blades (Males)	86.9	84.4	103
Shampoo	98.5	89.0	111
Toothpaste/Tooth Polish	99.2	97.4	102
Vitamins (Children)	42.9	23.9	179
Vitamins (Adults)	49.9	56.8	88

Source: Strategy Research Corporation

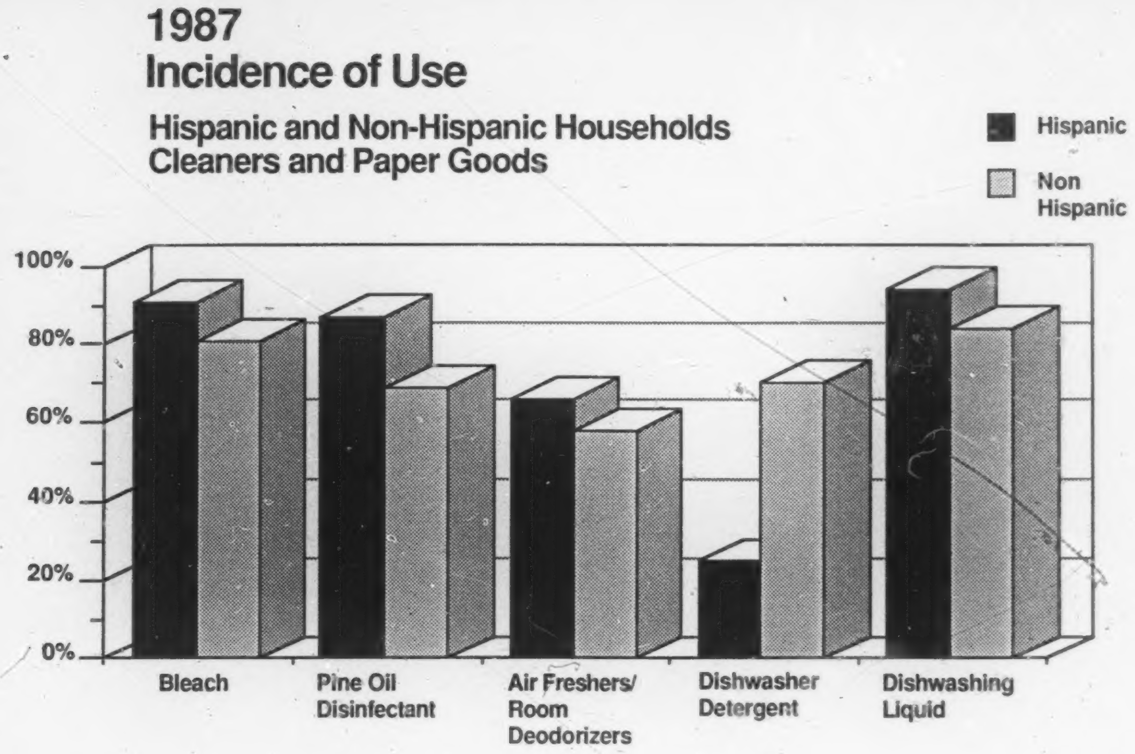
3. Cleaners and Paper Goods

Air Fresherners/Room Deodorizers, Liquid/Powdered Bleach, Dishwashing Liquid, Liquid Dishwashing Detergent, Liquid Fabric Softeners and Pine Oil Disinfectants register the highest usage for Hispanic households.

1987
INCIDENCE OF USE
HISPANIC AND NON-HISPANIC HOUSEHOLDS
CLEANERS AND PAPER GOODS
USE INDEX

	Total Hispanics	Total Non-Hispanics	Use Index Hispanic to Non-Hispanic
Air Fresheners/Room Deodorizers	65.9%	58.5%	113
Bleach - Liquid and Powdered	90.8	80.6	113
Detergent - Dishwasher	25.0	69.9	36
Detergent - Laundry	99.3	96.0	103
Dishwashing Liquid	94.3	84.8	111
Fabric Softeners - Dryer	54.7	61.3	89
Fabric Softeners - Liquid	83.8	47.6	176
Insecticides - House & Garden	60.3	62.0	97
Paper Towels	94.8	94.6	100
Pine Oil Disinfectants	86.9	68.5	127
Plastic Garbage Bags & Trash Can Liners	81.5	81.3	100
Plastic Sandwich/Storage Bags	58.2	70.9	82
Plastic Type Kitchen Wraps	50.5	70.4	72

Source: Strategy Research Corporation



1987
Incidence of Use
Hispanic and Non-Hispanic Households
Cleaners and Paper Goods

Source: Strategy Research Corporation

4. Miscellaneous Products

Of four Miscellaneous products, three register higher usage among Hispanics than non-Hispanics. These are Cigarettes, Running Shoes, and Blue Jeans.

1987
INCIDENCE OF USE
HISPANIC AND NON-HISPANIC HOUSEHOLDS
MISCELLANEOUS PRODUCTS
USE INDEX

	Total Hispanics	Total Non-Hispanics	Use Index Hispanic To Non-Hispanic
Batteries	80.3%	89.1%	90
Blue Jeans	85.9	70.6	122
Cigarettes	56.3	39.2	144
Running/Athletic Shoes	72.6	57.8	126

Source: Strategy Research Corporation

B. HISPANIC HOUSEHOLD USAGE

The following is data pertaining to the incidence of usage for a wide array of products among Hispanics, analyzed by market region and by country of origin.

1. Hispanic Household Usage By Market Region

The following presents data on Hispanic usage for Food and Beverage items, Health and Beauty Aids, Cleaners and Paper Goods, and Miscellaneous products by market region.

a. Food And Beverage

Several Food and Beverage products register over 90% incidence of use among Hispanics. For example, Mayonnaise registers a total incidence of use of 96.0% with 99.4% incidence among Hispanic consumers in the Southwest.

Ketchup, as well as Liquid Cooking and Salad Oil are also household products with high overall levels of use (95.5% and 90.0%, respectively).

Usage of Ground-American Style Coffee and Ground-Latin Style Coffee also differs among markets. Specifically, usage of Ground-American Style Coffee is lowest in the Northeast and Southeast; however, these two markets register the highest levels of usage for Ground-Latin Style Coffee.

The use of Frozen Fruit Juice, Chewing Gum, Shortening, Baby Food-Jar/Instant, Children's Powdered and Frankfurters/Weiners/Hot Dogs all register substantially lower incidences of use among consumers in the Southeast than in other markets.

1987
INCIDENCE OF USE HISPANIC HOUSEHOLDS FOOD AND BEVERAGE ITEMS BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
Baby Food-Jar/ Instant	31.3%	18.4%	11.6%	22.1%	21.6%	49.9%
Barbecue Sauce	60.5	40.4	61.6	76.9	70.6	58.7
Breakfast Cereal-Cold	88.6	85.6	57.8	96.4	94.1	91.0
Breakfast Cereal-Hot	53.1	48.8	25.8	67.1	64.7	49.9
Candy Bars	56.7	42.1	14.3	79.8	56.3	69.4
Cheese-Sliced/ Processed	78.1	80.4	82.0	98.6	77.0	74.6
Chewing Gum	71.4	61.6	42.4	74.9	76.5	77.4
Coffee-Instant/ Freeze Dried	71.5	50.7	31.6	25.8	76.7	90.9
Coffee-Ground - American Style	62.2	31.4	43.7	78.8	76.4	66.8
Coffee-Ground - Latin Style	54.2	83.9	89.0	77.9	28.9	50.1
Crackers	86.5	86.8	74.0	82.3	88.0	88.0
Drinks-Children's Powdered	50.2	47.1	33.6	76.6	57.4	45.0
Frankfurters/ Weiners/Hot Dogs	74.4	74.4	45.7	94.5	78.8	74.4
Flour	72.0	71.3	44.0	44.8	79.8	75.0
Frozen Dinners	32.0	24.7	16.0	39.9	36.7	34.5
Frozen Fruit Bars/ Pops	74.9	65.6	58.9	96.0	72.2	81.2
Frozen Ice Cream Bars/Pops	69.2	52.8	46.2	60.4	71.4	80.9
Frozen Pizza	37.8	21.2	35.2	55.6	42.1	39.5
Fruit Juice-Chilled/ Bottled	69.7	73.0	58.0	75.2	70.0	68.6
Fruit Juice-Frozen	65.9	67.6	46.5	84.5	67.4	65.4
Fruit Nectars	65.3	69.2	64.1	77.0	51.5	73.7

Continued. . .

1987
INCIDENCE OF USE
HISPANIC HOUSEHOLDS
FOOD AND BEVERAGE ITEMS
BY MARKET REGION
(Continued)

	Total	North-east	South-east	Central	South-west	California
Ketchup	95.5%	94.9%	95.0%	97.9%	96.2%	95.3%
Luncheon Meats - Canned	39.4	39.0	26.4	58.6	46.2	34.5
Luncheon Meats - Pre-packaged	66.6	56.7	49.0	95.8	67.3	69.6
Margarine	88.3	82.3	83.8	78.7	90.1	92.3
Mayonnaise	96.0	98.4	69.1	88.5	99.4	98.6
Milk-Canned/ Evaporated	51.7	47.4	53.2	44.3	49.8	54.9
Milk-Powdered - Liquid/Additives	63.1	61.1	34.4	97.1	52.4	72.2
Mustard	71.1	43.0	54.8	82.5	85.2	75.3
Non-Stick Cooking Products - Aerosol	22.5	10.8	18.5	41.0	23.1	27.0
Oil-Liquid Cooking And Salad	90.0	97.4	93.4	96.6	85.9	89.2
Olive Oil	48.4	55.8	83.1	52.1	31.3	52.1
Peanut Butter	53.7	40.2	37.0	71.7	61.0	55.8
Potato Chips	77.9	73.5	46.5	96.4	82.9	79.0
Salad Dressing - Dry Mix/Prepared	61.2	60.3	61.7	52.7	61.3	60.8
Shortening	51.7	14.4	9.9	60.4	72.1	60.8
Soft Drinks - Regular	83.0	76.7	85.3	92.8	84.4	83.6
Soft Drinks - Lemon Lime	69.9	62.8	55.0	58.7	75.5	73.6
Soft Drinks - Orange	62.5	62.1	38.9	80.9	60.4	66.3
Soup - Canned	65.7	55.3	41.6	83.3	71.7	69.0
Soup - Dry/Instant	70.7	68.6	52.2	73.0	67.3	80.1
Spaghetti/Noodles - Dry	84.4	93.2	81.1	78.4	83.3	81.9
Spaghetti - Canned	41.9	53.5	16.6	87.2	36.0	40.9
Spaghetti Sauce	70.8	80.2	63.9	86.4	66.8	66.0

Continued. . .

1987
INCIDENCE OF USE
HISPANIC HOUSEHOLDS
FOOD AND BEVERAGE ITEMS
BY MARKET REGION
(Continued)

	Total	North-east	South-east	Central	South-west	California
Tea	63.0%	58.5%	65.8%	84.3%	66.2%	58.7%
Tomato Paste - Canned	80.8	74.4	60.0	39.3	88.9	86.6
Tomato Sauce - Canned/Bottled	89.8	94.8	94.1	94.7	93.5	82.1
Tuna Fish	73.6	72.3	69.9	67.7	78.8	73.7
Vegetables - Canned	67.6	82.8	57.7	96.5	64.3	61.1
Vegetables - Frozen	42.0	45.5	35.2	23.9	47.2	40.9
Yogurt	48.8	45.6	55.2	16.0	41.4	59.1
Beer - Regular	61.5	58.9	48.5	68.4	55.2	69.6
Beer - Malt Liquor	12.5	12.3	18.6	62.7	1.8	13.8
Brandy/Cognac	21.5	13.4	16.9	58.6	9.9	31.6
Rum	24.3	28.6	21.9	25.3	12.5	32.8
Scotch/Blended Whisky	26.2	31.2	34.2	27.4	18.4	29.2
Tequila	23.6	2.8	7.4	10.0	16.2	45.4
Wine Coolers	27.1	33.9	12.2	22.9	22.3	31.7

Source: Strategy Research Corporation

b. Health And Beauty Aids

Among the Health and Beauty Aids products surveyed, Bath/Bar Soap, Toothpaste, Shampoo and Deodorants have the highest incidence of use among Hispanics overall. On the other hand, however, Disposable Baby Diapers, Men's Electric Razors, and Hand and Body Lotion are products least likely to be found in a Hispanic home.

Face Cream/Lotion/Moisturizer and Hand and Body Lotion register the lowest incidence of use among Hispanics in the Southeast. Whereas these two Lotions register incidences of use of 51.6% (Face Cream) and 66.5% (Body Lotion) in this southern Hispanic market, the lowest level of incidence for either of these two products recorded by any of the other major markets is 77.9%. Likewise, the Southeast records the lowest use of After Shave Lotion (38.7%) compared to the Northeast (86.4%), California (89.1%), Central (97.2%) and the Southwest (72.8%).

Hispanic consumers in Florida also register lower incidence of use for Children's Vitamins.

The lowest incidence of use of Hair Spray is recorded in the Southeast as well where only 32.8% of the Hispanic females surveyed cited usage of this hair care product.

1987
INCIDENCE OF USE
HISPANIC HOUSEHOLDS
HEALTH AND BEAUTY AIDS
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
After Shave Lotion (Males)	81.4%	86.4%	38.7%	97.2%	72.8%	89.1%
Bath/Bar Soap	98.8	97.6	94.7	96.6	99.2	97.5
Cold Remedies - Liquid	76.7	81.6	74.7	86.2	67.7	80.3
Cold Remedies - Tablets	75.2	77.4	50.8	41.7	72.9	84.9
Cough Syrup	67.1	75.1	59.2	83.5	55.2	71.7
Cream Rinse/ Conditioner	77.4	88.3	59.9	88.5	68.6	81.2
Deodorant	97.4	96.1	89.3	97.6	97.7	99.1
Disposable Baby Diapers	25.3	19.6	25.1	10.6	28.7	26.3
Electric Razors (Men)	30.6	21.8	14.9	27.6	23.1	44.5
Eye Make-Up (Females)	70.2	68.1	69.3	94.2	61.0	75.5
Face Cream/Lotion/ Moisturizer	81.8	88.4	51.6	80.5	77.9	88.7
Facial Tissues	75.4	74.4	44.5	91.4	81.3	74.4
Hair Coloring (Females)	47.6	47.6	45.4	51.1	43.1	51.9
Hair Spray (Females)	50.1	39.6	32.8	85.9	52.2	53.5
Hand and Body Lotion	85.5	96.7	66.5	97.7	80.8	85.2
Headache Remedies/ Pain Killers	94.3	94.6	90.8	96.6	92.7	95.6
Indigestion/Upset Stomach Remedies	85.1	79.7	90.7	87.9	83.6	85.3
Laxatives	48.6	46.7	36.5	43.8	41.4	58.9
Lipstick (Females)	85.6	91.8	82.2	97.1	75.4	90.0
Mouthwash	76.9	80.5	84.9	91.3	68.6	77.2

Continued. . .

1987
INCIDENCE OF USE
HISPANIC HOUSEHOLDS
HEALTH AND BEAUTY AIDS
BY MARKET REGION
(Continued)

	Total	North-east	South-east	Central	South-west	California
Nail Polish (Females)	84.7%	86.1%	76.1%	94.4%	83.1%	85.6%
Panty Hose (Females)	75.3	81.3	71.7	97.7	70.1	73.9
Perfume (Females)	92.4	97.4	91.1	97.7	85.5	94.9
Pre-Moistened Cleansing Wipes	37.9	31.7	23.1	11.4	26.7	56.2
Razor Blades (Males)	86.9	86.7	60.1	92.7	81.2	93.3
Shampoo	98.5	99.7	93.3	96.9	97.7	99.2
Toothpaste/ Tooth Polish	99.2	99.7	98.0	98.1	98.0	97.6
Vitamins (Children)	42.9	39.5	19.8	74.5	36.8	50.2
Vitamins (Adults)	49.9	44.3	37.4	22.7	50.1	58.6

Source: Strategy Research Corporation

c. Cleaners And Paper Goods

Cleaners and Paper Goods such as Bleach, Laundry Detergent, Dishwashing Liquid Paper Towels and Pine Oil Disinfectants are extremely popular among Hispanics.

The use of Bleach, Laundry Detergent, and Paper Towels are extremely prevalent in Hispanic households in the Southeast.

Stand out items in terms of relative use by Hispanic households in the Northeast and Central markets include Bleach, Laundry Detergent, Fabric Softeners and Dishwashing Liquid.

In California, the use of Laundry Detergent and Dishwashing Liquid register high levels of usage among the markets surveyed. In the Southwest region, House and Garden Insecticides register a higher incidence of household use than in the other major Hispanic markets.

1987
INCIDENCE OF USE
HISPANIC HOUSEHOLDS
CLEANERS AND PAPER GOODS
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
Air Fresheners/Room Deodorizers	65.9%	66.9%	66.7%	95.6%	66.8%	60.1%
Bleach - Liquid and Powdered	90.8	92.6	98.3	92.5	89.7	88.6
Detergent - Dishwasher	25.0	7.7	30.3	4.7	32.6	30.5
Detergent - Laundry	99.3	98.6	97.9	99.1	97.9	99.6
Dishwashing Liquid	94.3	95.9	96.5	95.3	91.3	94.4
Fabric Softeners - Dryer	54.7	29.0	58.5	53.5	62.4	60.7
Fabric Softeners - Liquid	83.8	91.5	75.2	98.6	76.9	85.7
Insecticides - House & Garden	60.3	56.0	39.8	70.6	71.7	58.4
Paper Towels	94.8	93.5	97.1	97.4	98.2	92.0
Pine Oil Disinfectants	86.9	83.2	82.8	86.7	87.7	87.4
Plastic Garbage Bags & Trash Can Liners	81.5	77.4	79.2	90.6	79.0	84.4
Plastic Sandwich/ Storage Bags	58.2	37.1	28.6	52.6	70.2	65.0
Plastic Type Kitchen Wraps	50.5	46.8	54.3	45.4	57.4	47.0

Source: Strategy Research Corporation

d. Miscellaneous Products

Usage of Batteries, Blue Jeans and Cigarettes in the Southeast is noticeably lower than in the other markets.

1987
INCIDENCE OF USE
HISPANIC HOUSEHOLDS
MISCELLANEOUS PRODUCTS
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
Batteries	80.3%	87.3%	69.9%	88.8%	76.0%	81.1%
Blue Jeans	85.9	87.4	59.1	88.4	85.7	90.5
Cigarettes	56.3	64.6	38.5	52.0	41.7	67.8
Running/Athletic Shoes	72.6	72.0	57.8	92.3	57.2	84.8

Source: Strategy Research Corporation

2. Hispanic Household Usage By Country Of Origin

a. Food And Beverage

Several Food and Beverage products register a higher incidence of usage among households of Puerto Rican origin. For example, Luncheon Meat-Canned registers an incidence of usage of 66.9% for households of Puerto Rican origin, whereas in households of Cuban and Mexican origin usage is 16.6% and 44.4%, respectively. In addition, the highest levels of usage for Spaghetti/Noodles-Dry, and Spaghetti Sauce are among households of Puerto Rican origin. Fruit Type Drinks and Frankfurters are also most frequently consumed by Puerto Rican households.

The highest incidences of usage for Coffee-Instant/Freeze Dried and Barbecue Sauce are recorded by households of Mexican origin.

Households of Cuban origin register higher incidence of usage than households of other Hispanic origins for Yogurt , Olive Oil, and Latin Style Ground Coffee.

1987
U.S. HISPANIC MARKET
INCIDENCE OF USE
FOOD AND BEVERAGE ITEMS
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Baby Food-Jar/ Instant	13.0%	35.8%	16.3%	35.3%
Barbecue Sauce	64.7	67.0	58.4	42.4
Breakfast Cereal- Cold	61.6	91.7	90.4	87.0
Breakfast Cereal- Hot	23.7	63.3	65.8	31.7
Candy Bars	17.5	68.4	47.7	44.2
Cheese-Sliced/ Processed	86.7	76.7	82.6	76.7
Chewing Gum	36.2	78.3	66.4	67.0
Coffee-Instant/ Freeze Dried	28.0	82.4	43.1	76.1
Coffee-Ground - American Style	55.0	69.3	38.1	56.2
Coffee-Ground - Latin Style	87.0	38.6	83.9	64.5
Crackers	86.0	88.6	85.0	85.3
Drinks-Children's Powdered	13.8	52.4	46.9	59.4
Frankfurters/ Weiners/ Hot Dogs	44.8	75.1	89.6	70.3
Flour	43.8	76.2	71.4	69.7
Frozen Dinners	19.7	34.6	38.6	24.1
Frozen Fruit Bars/ Pops	49.7	82.7	62.3	68.7
Frozen Ice Cream Bars/Pops	43.0	79.0	63.2	55.3
Frozen Pizza	32.6	43.4	31.2	27.7

Continued. . .

1987
U.S. HISPANIC MARKET
INCIDENCE OF USE
FOOD AND BEVERAGE ITEMS
BY COUNTRY OF ORIGIN

(Continued)

	Cuba	Mexico	Puerto Rico	Other
Fruit Juice - Chilled/Bottled	59.2%	70.5%	73.9%	69.5%
Fruit Juice - Frozen	55.1	65.9	73.5	63.9
Fruit Nectars	70.6	60.1	74.6	71.0
Ketchup	95.5	96.5	97.4	91.6
Luncheon Meats - Canned	16.6	44.4	66.9	22.9
Luncheon Meats - Pre-packaged	48.6	66.9	75.2	64.9
Margarine	90.5	90.8	84.2	82.6
Mayonnaise	69.1	98.6	95.4	97.7
Milk-Canned/ Evaporated	62.8	51.7	46.1	52.5
Milk-Powdered/ Liquid Additives	51.4	68.2	58.8	55.5
Mustard	38.4	82.0	47.1	64.5
Non-Stick Cooking Products - Aerosol	17.3	25.8	9.9	20.9
Oil-Liquid Cooking And Salad	97.4	86.0	98.9	91.8
Olive Oil	95.2	41.1	62.5	44.4
Peanut Butter	17.0	64.0	54.9	39.6
Potato Chips	36.7	85.0	78.4	74.2

Continued. . .

1987
U.S. HISPANIC MARKET
INCIDENCE OF USE
FOOD AND BEVERAGE ITEMS
BY COUNTRY OF ORIGIN
(Continued)

	Cuba	Mexico	Puerto Rico	Other
Salad Dressing - Dry Mix/ Prepared	74.0%	58.5%	67.5%	61.0%
Shortening	11.9	67.7	32.7	34.7
Soft Drinks - Regular	90.6	85.2	80.8	76.4
Soft Drinks - Lemon Lime	62.2	72.5	64.1	69.6
Soft Drinks - Orange	53.9	64.2	60.0	62.1
Soup - Canned	34.7	70.2	65.3	63.2
Soup - Dry/ Instant	56.5	70.7	77.9	72.9
Spaghetti/Noodles - Dry	84.1	83.4	90.3	82.9
Spaghetti - Canned	16.2	37.4	73.5	38.8
Spaghetti Sauce	43.7	69.4	88.4	77.4
Tea	49.5	64.5	60.6	65.1
Tomato Paste - Canned	65.3	87.4	67.1	81.9
Tomato Sauce - Canned/Bottled	79.0	91.2	96.5	87.5
Tuna	61.0	76.1	73.8	71.7
Vegetables - Canned	44.0	70.6	84.6	62.5
Vegetables - Frozen	40.7	41.8	34.8	48.5
Yogurt	67.7	48.2	33.0	56.2

Continued. . .

1987
U.S. HISPANIC MARKET
INCIDENCE OF USE
FOOD AND BEVERAGE ITEMS
BY COUNTRY OF ORIGIN

(Continued)

	Cuba	Mexico	Puerto Rico	Other
Beer - Regular	43.3%	62.2%	51.5%	70.8%
Beer - Malt Liquor	17.7	10.7	15.6	13.9
Brandy/Cognac	20.5	19.8	14.7	29.0
Rum	15.9	21.5	31.7	29.4
Scotch/Blended Whisky	36.7	17.5	37.8	38.0
Tequila	12.8	29.6	4.6	24.6
Wine Coolers	15.2	23.0	39.5	32.6

Source: Strategy Research Corporation

b. Health And Beauty Aids

Usage of Cold Remedies-Tablets record a higher incidence among households of Mexican origin. In addition, Mexican households register a high incidence of usage for Deodorant, Facial Tissues, Bath/Bar Soap, Laxatives, and Headache Remedies/Pain Killers.

Households of Cuban origin record the highest incidence of usage for Eye Make-Up, Indigestion/Upset Stomach Remedies and Perfume/Cologne.

Cream Rinse/Conditioners, Shampoo and Hand and Body Lotion usage register the highest incidence among Puerto Rican-Americans households.

1987
U.S. HISPANIC MARKET
INCIDENCE OF USE
HEALTH AND BEAUTY AIDS
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
After Shave Lotion (Males)	71.8%	80.5%	89.7%	84.8%
Bath/Bar Soap	99.2	98.9	97.9	98.8
Cold Remedies - Tablets	46.1	77.6	66.9	83.4
Cold Remedies - Liquid	80.8	76.5	89.7	70.3
Cough Syrup	43.3	68.7	68.7	70.9
Cream Rinse/ Conditioner	74.9	73.2	95.4	81.9
Deodorant	91.6	98.0	97.6	95.4
Disposable Baby Diapers	5.1	28.4	15.5	28.6
Electric Razors (Men)	11.5	32.4	21.1	37.9
Eye Make-Up (Females)	78.4	67.4	72.8	73.7
Face Cream/Lotion/ Moisturizer	53.4	81.9	82.0	88.5
Facial Tissues	36.6	81.1	72.0	76.1
Hair Coloring (Females)	54.2	48.0	52.9	40.5
Hair Spray (Females)	28.0	52.5	46.6	51.4
Hand and Body Lotion	68.6	84.3	98.3	87.6
Headache Remedies/ Pain Killers	93.4	94.7	98.2	90.8
Indigestion/Upset Stomach Remedies	91.8	86.7	73.3	83.3
Laxatives	43.5	49.7	45.8	49.3
Lipstick (Females)	85.5	83.0	88.9	90.1
Mouthwash	67.9	81.3	78.4	68.0

Continued. . .

1987
U.S. HISPANIC MARKET
INCIDENCE OF USE
HEALTH AND BEAUTY AIDS
BY COUNTRY OF ORIGIN

(Continued)

	Cuba	Mexico	Puerto Rico	Other
Nail Polish (Females)	80.5%	82.0%	82.0%	95.5%
Panty Hose (Females)	72.9	74.3	75.0	78.5
Perfume/Cologne (Females)	94.6	91.5	93.1	90.8
Pre-Moistened Cleansing Wipes	22.4	40.7	38.8	34.5
Razor Blades (Males)	85.9	87.0	88.2	86.5
Shampoo	96.7	98.3	99.6	98.7
Toothpaste/ Tooth Polish	99.1	99.0	99.6	99.3
Vitamins (Children)	18.1	46.9	37.3	44.1
Vitamins (Adults)	42.9	54.9	44.7	60.4

Source: Strategy Research Corporation

c. Cleaners And Paper Goods

Cleaners such as Pine Oil Disinfectants, Dishwashing Liquid and Bleach record the highest incidence for usage among households of Puerto Rican origin.

Households of Cuban origin record the highest incidence of usage for Laundry Detergent and Dishwashing Liquid.

Laundry Detergent and Paper Towels register the highest incidence of usage among households of Mexican origin.

1987
U.S. HISPANIC MARKET
INCIDENCE OF USE
CLEANERS AND PAPER GOODS
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Air Fresheners/Room Deodorizers	66.2%	64.0%	65.4%	71.1%
Bleach - Liquid and Powdered	78.6	90.5	94.7	94.3
Detergent - Dishwasher	16.2	28.0	9.0	30.3
Detergent - Laundry	98.6	98.7	94.2	93.6
Dishwashing Liquid	93.1	92.8	94.2	96.5
Fabric Softeners - Dryer	51.9	61.5	38.8	44.6
Fabric Softeners - Liquid	78.0	81.0	90.9	87.8
Insecticides - House & Garden	37.3	63.0	53.2	65.1
Paper Towels	89.2	97.1	92.6	91.7
Pine Oil Disinfectants	86.7	86.4	98.1	80.1
Plastic Garbage Bags & Trash Can Liners	80.1	82.2	81.4	80.0
Plastic Sandwich/ Storage Bags	27.7	67.0	53.6	48.4
Plastic Type Kitchen Wraps	49.0	50.5	40.9	58.0

Source: Strategy Research Corporation

d. Miscellaneous Products

1987
U.S. HISPANIC MARKET
INCIDENCE OF USE
MISCELLANEOUS PRODUCTS
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Batteries	79.7%	77.7%	89.8%	83.3%
Blue Jeans	61.7	87.6	89.5	85.8
Cigarettes	34.1	51.5	61.7	79.1
Running/Athletic Shoes	55.7	77.2	69.9	67.9

Source: Strategy Research Corporation

Households of Puerto Rican origin show the highest incidence of usage for Batteries and Blue Jeans.

Running Shoes register the highest incidence of usage among households of Mexican origin.

XVI. OWNERSHIP PATTERNS

XVI. OWNERSHIP PATTERNS

This section of the Report presents data with regard to U.S. Hispanics ownership of various types of goods and services. Specifically, Hispanics were queried regarding automobile ownership, credit card ownership, telephone ownership, home ownership and the maintenance of checking and savings accounts.

A. AUTOMOBILE OWNERSHIP

Hispanics were queried as to whether or not they owned an automobile. If so, they were asked to state the number of cars they had in their household.

1. Incidence Of Ownership

a. By Market Region

Seventy-three percent of all U.S. Hispanics own at least one automobile. The highest levels of ownership are reported by Hispanics in the Southwest region of the country (85.1%), as well as by those in California (84.4%).

1987
U.S. HISPANIC MARKET
INCIDENCE OF AUTOMOBILE OWNERSHIP
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
Yes	73.1%	33.5%	76.6%	55.8%	85.1%	84.4%
No	26.9	66.5	23.4	44.2	14.9	15.6
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

The incidence of ownership is lowest among Hispanics in the Northeast region of the U.S. (33.5%).

b. By Country Of Origin

Mexican-Americans are the Hispanics showing the highest level of automobile ownership (84.7%).

1987
U.S. HISPANIC MARKET
INCIDENCE OF AUTOMOBILE OWNERSHIP BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Yes	77.4%	84.7%	39.5%	60.6%
No	22.6	15.3	60.5	39.4
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

In comparison, Puerto Rican-Americans register the lowest incidence of car ownership (39.5%).

c. By Age Group

By age group, the highest incidence of car ownership is among Hispanics 35 to 54 years of age (78.0%).

1987
U.S. HISPANIC MARKET
INCIDENCE OF AUTOMOBILE OWNERSHIP BY AGE GROUP

	18-34	35-54	55+
Yes	75.3%	78.0%	58.2%
No	24.7	22.0	41.8
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

The lowest incidence occurs among Hispanic-Americans over 55 years of age (58.2%).

2. Number Of Cars Per Household

a. By Market Region

Hispanics were asked how many automobiles were owned by members of their household. The majority of Hispanic-Americans own one car per household (55.7%), and one-third (33.9%) have two.

The incidence of three automobiles per Hispanic household registers at 7.7%.

1987
U.S. HISPANIC MARKET
NUMBER OF AUTOMOBILES PER HOUSEHOLD
BY MARKET REGION

	Total	Northeast	Southeast	Central	Southwest	California
One	55.7%	80.8%	51.7%	71.7%	51.7%	53.1%
Two	33.9	14.7	30.7	18.6	39.6	35.4
Three	7.7	4.5	7.5	9.7	7.3	8.6
Four	2.1	0.0	8.6	0.0	1.2	2.1
More Than Four	0.6	0.0	1.5	0.0	0.2	0.8
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average Number Of Cars Per Household	1.6	1.2	1.8	1.4	1.6	1.6

Source: Strategy Research Corporation

The highest incidence of single automobile ownership is found in the Northeast U.S. (80.8%), while the lowest level is registered in the Southeast and Southwest regions of the country (51.7% incidence in each area).

Multiple automobile ownership is most prominent in the Southwest (48.3%), and least typical in the Northeast (19.2%).

The Central U.S. has the highest incidence of Hispanics owning three cars (9.7%), while the Southeast has the highest level of four or more car ownership (10.1%).

Overall, the average number of automobiles per household among U.S. Hispanics is 1.6. Averages range from a high of 1.8 in the Southeast to a low of 1.2 in the Northeast.

b. By Country Of Origin

In general, Cuban-Americans record the greatest number of cars per household (1.7), while Puerto Rican-Americans register the lowest level (1.3).

1987
U.S. HISPANIC MARKET
AVERAGE NUMBER OF AUTOMOBILES PER HOUSEHOLD BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
One	57.8%	53.3%	76.5%	55.0%
Two	27.4	36.3	15.8	36.9
Three	5.2	8.6	7.7	5.6
Four	7.6	1.1	0.0	2.5
More Than Four	2.0	0.7	0.0	0.0
TOTAL	100.0%	100.0%	100.0%	100.0%
Average Number Of Cars Per Household	1.7	1.6	1.3	1.6

Source: Strategy Research Corporation

Three-fourths (76.5%) of the Puerto Rican-Americans own one vehicle, while 57.8% of Cuban-Americans own one automobile, as do 53.3% of Mexican-Americans and 55.0% of Other Hispanic-Americans.

A total of 9.6% of the Cuban-American households indicate having four or more automobiles.

B. CREDIT CARD OWNERSHIP

Hispanics were queried with regard to the incidence of credit card ownership as well as the types of cards that they had.

1. Incidence Of Ownership

a. By Market Region

More than one-fourth of all U.S. Hispanics (28.8%) are credit card holders. The level of ownership is highest among Hispanics in the Southeast (35.3%) and the Southwest regions (34.6%) of the U.S.

1987
U.S. HISPANIC MARKET
INCIDENCE OF CREDIT CARD OWNERSHIP
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
Yes	28.8%	22.4%	35.3%	15.4%	34.6%	28.1%
No	63.6	76.9	63.8	81.0	61.4	55.8
Don't Know	7.6	0.7	0.9	3.6	4.0	16.1
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

The incidence of credit card ownership is lowest among Hispanics in the Central United States (15.4%).

b. By Country Of Origin

Among Hispanics with credit cards, the Cuban-Americans record a higher level of ownership than any other group. Almost one-half (45.7%) of the Cuban-Americans have at least one credit card.

1987
U.S. HISPANIC MARKET
INCIDENCE OF CREDIT CARD OWNERSHIP
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Yes	45.7%	28.7%	20.8%	26.4%
No	53.1	61.9	79.2	62.4
Don't Know	1.2	9.4	0.0	11.2
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

To a lesser extent, Mexican-Americans (28.7%) and Other Hispanics (26.4%) also possess credit cards. A 20.8% level of ownership is reported by U.S. Puerto Rican-Americans.

c. By Age Group

The lowest incidence of credit card ownership is among Hispanics 18 to 34 years of age (26.3%).

1987
U.S. HISPANIC MARKET
INCIDENCE OF CREDIT CARD OWNERSHIP
BY AGE GROUP

	18-34	35-54	55+
Yes	26.3%	32.0%	30.1%
No	65.5	60.8	63.1
Don't Know	8.2	7.2	6.8
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Three out of every ten Hispanics 35+ are credit card owners.

2. Types Of Credit Cards Owned

a. By Market Region

Among Hispanics with credit cards, the majority (64.8%) have Department Store types, as well as Bankcards such as MasterCard/Visa (61.2%).

More than seven out of every ten Hispanics in the Southwest, Southeast, and Central regions of the U.S. are Department Store Credit Card holders.

1987
U.S. HISPANIC MARKET
TYPES OF CREDIT CARDS OWNED
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
Department Store	64.8%	58.3%	75.1%	73.7%	78.2%	51.2%
Bankcard - Master-Card/Visa	61.2	64.8	63.4	37.5	51.2	71.5
Gas Company	41.1	13.4	55.4	7.5	39.9	53.3
Travel/Entertainment - American Express/Carte Blanche/Diners Club	17.6	31.4	23.5	22.1	8.8	18.9
TOTAL	*	*	*	*	*	*

* Multiple Response

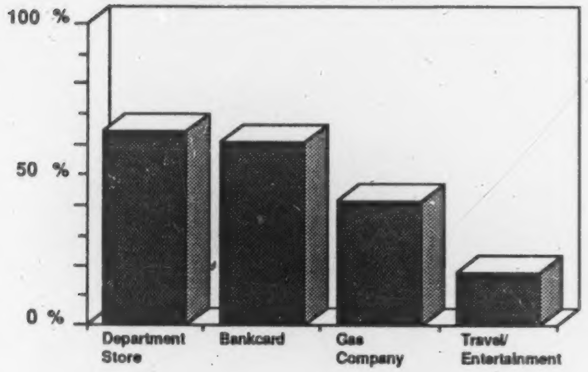
Source: Strategy Research Corporation

Comparatively, the Bankcard type is most popular in California (71.5%) and in the Northeast (64.8%).

Gas Company Credit Cards are held by 41.1% of U.S. Hispanics in general. Incidence is highest in the Southeast region and in California (55.4% and 53.3%); incidence is lowest in the Central and Northeast regions of the U.S. (7.5% and 13.4%, respectively).

Overall, the incidence of the Travel/Entertainment type of credit card among Hispanics is lower than other types of credit card (17.6%). While incidence is strongest in the Northeast U.S. (31.4%), it is weakest (8.8%) in the Southwest region of the country.

1987
U.S. Hispanic Market
Types of Credit Cards Used



Source: Strategy Research Corporation

b. By Country Of Origin

The Department Store Credit Card is the type of credit card which most Mexican-Americans possess (71.3%).

In comparison, the Bankcard is the type of card held by more than seven out of ten Puerto Rican-Americans and Mexican-Americans; 65.9% of Other Hispanic-Americans also have a MasterCard/Visa Card.

1987
U.S. HISPANIC MARKET
TYPES OF CREDIT CARDS OWNED
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Department Store	54.6%	71.3%	70.4%	48.1%
Bankcard - MasterCard/ Visa	74.7	54.3	77.6	65.9
Gas Company	43.2	48.9	27.5	23.8
Travel/Entertainment - American Express/ Carte Blanche/ Diners Club	18.4	12.9	21.7	31.2
TOTAL	*	*	*	*

* Multiple Response

Source: Strategy Research Corporation

Ownership of Gas Company Credit Cards registers the highest level among Mexican (48.9%) and Cuban-Americans (43.2%); it is lowest among Puerto Rican-Americans and Other Hispanic-Americans (27.5% and 23.8%, respectively).

A Travel/Entertainment Card is held most frequently by Other Hispanic-Americans (31.2%), and least by Mexican-Americans (12.9%).

c. By Age Group

The Bankcard is owned most often by Hispanics 55 years of age and older (73.5%); the Bankcard registers the lowest level of ownership among those aged 18 to 34 (52.9%).

1987
U.S. HISPANIC MARKET
TYPES OF CREDIT CARDS OWNED
BY AGE GROUP

	18-34	35-54	55+
Department Store	63.7%	69.0%	59.8%
Bankcard - MasterCard/ Visa	52.9	65.6	73.5
Gas Company	37.5	44.5	43.8
Travel/Entertainment - American Express/ Carte Blanche/ Diners Club	20.3	19.5	7.3
TOTAL	*	*	*

* Multiple Response

Source: Strategy Research Corporation

Hispanics 35+ are the most frequent owners of Gasoline Company Credit Cards, while Travel/Entertainment Cards are possessed by about one-fifth of Hispanics under 54 years of age.

C. TELEPHONE OWNERSHIP

Overall, approximately 69% of all U.S. Hispanics have at least one telephone in their home. Thirty-eight percent of Hispanic households have telephone numbers which do not appear in the local phone directory; 31% have listed numbers.

Ninety-one percent of the Hispanic households in the Southeast region have telephones - the highest incidence recorded among the regions. Thirty-eight percent of Southeast Hispanic households have unlisted numbers.

Seventy percent of the Hispanics in the Southwest region have a household telephone. Thirty-eight percent of the region's phones have unpublished numbers, while 32% of the Hispanic households have listed phone numbers.

1987
U.S. HISPANIC MARKET
TELEPHONE OWNERSHIP STATUS

	Hispanic Households		
Region	Without Phone	With Unlisted Phone	With Listed Phone
Northeast	38%	34%	28%
Southeast	9	38	53
Central	29	36	35
California	30	35	35
Southwest	30	38	32
TOTAL U.S. HISPANICS	31%	38%	31%

Source: Strategy Research Corporation

Thirty-eight percent of the Hispanic households in the Northeast region also indicate the lack of a home phone.

It should be pointed out that the lack of a phone in a Hispanic household does not necessarily mean that the family cannot afford one; for many Hispanics, a telephone is simply not part of their culture.

D. HOME OWNERSHIP

The values of U.S. Hispanics concerning the ownership of their own home are explored in this section. The intent of Hispanics to purchase a home in 1987 is also addressed.

1. Importance Of Home Ownership

a. By Market Region

Home ownership is important to U.S. Hispanics. More than three-fourths of all Hispanics feel that it is "Very Important" to own their own home (77.9%).

1987
U.S. HISPANIC MARKET
IMPORTANCE OF HOME OWNERSHIP
BY MARKET REGION

	Total	Northeast	Southeast	Central	Southwest	California
Very Important	77.9%	82.2%	81.7%	89.1%	87.5%	65.7%
Somewhat Important	11.7	10.2	9.9	8.0	6.3	18.0
Neither Important Nor Unimportant	4.6	1.5	2.9	2.9	3.4	7.6
Not Very Important	2.7	3.8	3.8	0.0	2.3	2.5
Not At All Important	3.1	2.3	1.7	0.0	0.5	6.2
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

The importance of owning one's own home is felt most strongly by Hispanics in the Central U.S. (89.1% said it is "Very Important"), and to a lesser degree, (65.7%) by those in California. Nevertheless, this latter group still attributed a high level of importance to owning one's own home.

b. By Country Of Origin

More than any other Hispanic group, Puerto Rican-Americans feel the strongest about owning their own home (84.0% said it is "Very Important").

1987
U.S. HISPANIC MARKET
IMPORTANCE OF HOME OWNERSHIP
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Very Important	72.1%	78.9%	84.0%	72.5%
Somewhat Important	8.7	12.4	7.4	14.4
Neither Important Nor Unimportant	1.8	4.8	2.7	6.6
Not Very Important	3.4	2.0	4.2	3.5
Not At All Important	14.0	1.9	1.7	3.0
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Cuban and Other Hispanic-Americans feel that owning their own home is "Very Important" (72.1% and 72.5%, respectively).

c. By Age Group

The importance of owning a home is felt most strongly by Hispanics 35 years of age and older. Almost eight out of ten older Hispanics feel that it is "Very Important" to own their own home.

1987
U.S. HISPANIC MARKET
IMPORTANCE OF HOME OWNERSHIP
BY AGE GROUP

	18-34	35-54	55+
Very Important	76.8%	79.3%	79.1%
Somewhat Important	11.7	13.5	8.6
Neither Important Nor Unimportant	5.9	3.9	1.8
Not Very Important	2.6	2.2	3.8
Not At All Important	3.0	1.1	6.7
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

In addition, 76.8% of those Hispanics under 35 also feel that home ownership is "Very Important."

2. Intent To Purchase A Home - Next Twelve Months

a. By Market Region

One-fifth of Hispanics plan to purchase a home in the next twelve months (19.3%).

1987
U.S. HISPANIC MARKET
INTENT TO PURCHASE A HOME
IN THE NEXT TWELVE MONTHS
BY MARKET REGION

	Total	Northeast	Southeast	Central	Southwest	California
Yes	19.3%	21.0%	27.5%	9.6%	16.5%	19.1%
No	80.7	79.0	71.8	90.4	83.5	80.9
Don't Know	0.0	0.0	0.7	0.0	0.0	0.0
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Purchase intent is strongest among Hispanics in the Southeast region of the United States (27.5%), while it is lowest among those in the Central region (9.6%).

b. By Country Of Origin

The intent to purchase a home in the next twelve months is highest among Other Hispanic-Americans (27.8%), followed by Cuban-Americans (23.3%).

1987
U.S. HISPANIC MARKET
INTENT TO PURCHASE A HOME
IN THE NEXT TWELVE MONTHS
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Yes	23.3%	15.7%	18.8%	27.8%
No	76.1	84.3	81.2	72.2
Don't Know	0.6	0.0	0.0	0.0
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Among the Hispanic groups, Mexican-Americans record the lowest level of purchase intent for a new or used home in the next year (15.7%). An 18.8% level of purchase intent was recorded by Puerto Rican-Americans.

c. By Age Group

One-fifth of the U.S. Hispanics 18 to 54 years of age plan to purchase a home in the next year.

1987
U.S. HISPANIC MARKET
INTENT TO PURCHASE A HOME
IN THE NEXT TWELVE MONTHS
BY AGE GROUP

	18-34	35-54	55+
Yes	21.4%	21.1%	9.8%
No	78.5	78.9	90.2
Don't Know	0.1	0.0	0.0
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Fifty percent fewer Hispanics over the age of 54 plan on purchasing a home in the coming year (9.8%).

E. FINANCIAL RELATIONSHIPS

Hispanics were queried as to their current financial relationships, regarding maintaining a checking and/or savings account.

1. By Market Region

Overall, slightly less than one-third (32.0%) of all U.S. Hispanics maintain a checking account, while 38.1% have a savings account.

Almost one-half (48.8%) of the Hispanics in the Southeast region have a checking account, the highest level recorded for this type of account.

Seventeen percent of the Hispanics in the United States' Central region have a checking account -- the lowest level recorded among the regions for this type of banking relationship. That is, in the Central region, 83.2% of the Hispanic residents do not have any type of checking account.

1987
U.S. HISPANIC MARKET
INCIDENCE
CHECKING/SAVINGS ACCOUNT
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
Checking Account	32.0%	21.0%	48.8%	16.8%	39.2%	29.8%
Savings Account	38.1	29.1	48.4	30.2	41.2	38.5

Source: Strategy Research Corporation

As with checking accounts, the highest incidence recorded for the maintenance of a savings account was by Hispanics in the Southeast region (48.4% have a savings account, 51.6% do not).

Similarly, Hispanics in the Central states register one of the lowest levels of a savings account relationship (30.2% have a savings account, the remaining 69.8% do not).

2. By Country Of Origin

Overall, Hispanics who specified Cuba as their country of origin have the greatest degree of financial relationships with as regard to checking and savings accounts (45.2% and 42.5%, respectively).

1987
U.S. HISPANIC MARKET
INCIDENCE
CHECKING/SAVINGS ACCOUNT
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Checking Account	45.2%	34.8%	18.4%	27.2%
Savings Account	42.5	38.9	23.6	43.0

Source: Strategy Research Corporation

Checking accounts are held least frequently by Puerto Rican-Americans (18.4%), as are savings accounts (23.6%).

3. By Age

Banking relationships (checking and/or savings accounts) are most prominent among 35 to 54 year old Hispanics. Thirty-seven percent of this age group have a checking account and 43% have a savings account.

1987
U.S. HISPANIC MARKET
INCIDENCE
CHECKING/SAVINGS ACCOUNT
BY AGE GROUP

	18-34	35-54	55+
Checking Account	30.5%	36.9%	27.4%
Savings Account	36.5	42.8	34.1

Source: Strategy Research Corporation

Older Hispanics (55+) are the least likely to have either of these two types of bank accounts.

XVII. AIRLINE TRAVEL PATTERNS

XVII. AIRLINE TRAVEL PATTERNS

Do U.S. Hispanics travel by air? Where do they fly most frequently - to places within the United States and/or to other countries?

A. INCIDENCE OF TRAVEL

1. By Market Region

Three out of ten U.S. Hispanics travel by air.

Approximately one-third of Hispanic-Americans (31.4%) report having taken an airline trip in the past twelve months.

1987
U.S. HISPANIC MARKET
INCIDENCE OF PLANE TRAVEL
IN THE PAST TWELVE MONTHS
BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
Yes	31.4%	45.7%	38.5%	29.5%	26.3%	26.6%
No	68.6	54.3	61.5	70.5	73.7	73.4
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Airline travel is particularly common among Hispanics in the Northeast (45.7%). A total of 38.5% of the Hispanics in the Southeast have also flown in the past twelve months, as have 29.5% of the Hispanic-Americans living in the Central region. A total of 26.3% of those living in the Southwest states and 26.6% of those in the California region have also flown in the past year.

2. By Country Of Origin

Hispanic-Americans from Cuba and Puerto Rico report the highest incidence of airline travel (43.7% and 43.0%, respectively).

1987
U.S. HISPANIC MARKET
INCIDENCE OF PLANE TRAVEL
IN THE PAST TWELVE MONTHS
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
Yes	43.7%	25.1%	43.0%	37.3%
No	56.3	74.9	57.0	62.7
TOTAL	100.0%	100.0%	100.0%	100.0%

One-fourth of the Mexican-Americans (25.1%) have traveled by plane in the past twelve months; this is the lowest incidence among the various Hispanic groups.

B. FLIGHT DESTINATIONS

U.S. Hispanic air travelers were asked the destination of flights taken in the last twelve months.

a. By Market Region

The high incidence of plane travel to other countries exemplifies the strong ties that Hispanic-Americans have with their families. Almost two-thirds of those Hispanics living in the United States who flew in the past twelve months traveled to Spanish-speaking countries (63.1%).

In addition, Hispanics of every region except the Southwest, had a higher incidence of travel to Spanish-speaking countries than to other U.S. cities. Overall, air travel to various U.S. cities registered at the 42.4% level of those who reported taking flights in the last twelve months.

1987
U.S. HISPANIC MARKET
DESTINATION OF FLIGHTS TAKEN IN THE LAST TWELVE MONTHS BY MARKET REGION

	Total	North-east	South-east	Central	South-west	California
U.S.A (Net)	**42.4%**	**20.4%**	**43.0%**	**44.3%**	**76.2%**	**36.1%**
Los Angeles	12.2	1.1	9.7	8.1	30.3	8.8
San Diego	4.9	1.6	0.0	13.7	2.1	10.3
Dallas/Ft. Worth	4.6	0.0	1.5	2.0	17.7	0.0
New York	4.1	1.6	18.6	8.1	1.4	3.8
Miami	3.7	7.1	0.0	4.0	4.3	1.5
San Francisco	2.7	0.0	0.7	4.0	2.3	5.8
San Antonio	1.8	0.0	0.0	2.1	5.6	1.1
Houston	1.7	0.0	1.5	6.1	4.8	0.3
Chicago	1.7	1.2	1.2	2.1	2.1	1.9
Phoenix	1.7	0.0	0.0	0.0	5.2	1.2
Other U.S.A	7.5	9.9	11.7	2.0	9.5	3.8
Other Countries (Net)	**63.1%**	**84.2%**	**58.2%**	**73.3%**	**30.7%**	**67.8%**
Mexico	25.3	1.1	3.6	42.8	20.3	49.4
Puerto Rico	14.8	46.1	9.6	22.9	0.0	0.4
Dominican Republic	9.3	27.1	20.5	0.0	0.0	0.0
Ecuador	2.7	7.3	1.5	7.6	0.0	0.7
El Salvador	2.4	0.0	0.0	0.0	1.0	6.8
Spain	1.4	0.0	4.1	0.0	0.8	2.4
Colombia	1.3	2.8	1.5	0.0	0.0	1.2
Canada	1.2	2.0	3.4	0.0	0.0	1.1
Venezuela	1.0	0.0	0.0	0.0	4.2	0.0
Costa Rica	1.0	0.0	4.6	0.0	0.0	1.7
Other	4.6	2.1	6.0	0.0	5.5	6.4

Of the Hispanic-Americans who said they traveled by air, more than eight out of ten residing in the Northeast (84.2%) traveled outside of the continental United States. Many of these Northeastern Hispanics traveled to Puerto Rico (46.1%); also more than one-fourth flew to the Dominican Republic (27.1%). With regard to travel within the United States, Miami is the most popular destination for Northeast Hispanics (7.1%).

Spanish-speaking countries were the destination for almost three-fourths of the Hispanic air travelers fro the Central U.S. (73.3%). A total of 42.8% flew to Mexico and 22.9% traveled to Puerto Rico.

San Diego, with 13.7% of the mentions, was the main destination for Central region Hispanics who flew within the United States this past year.

Of the Hispanic inhabitants in California who traveled by plane within the past twelve months, 67.8% traveled to Hispanic countries; almost one-half traveled to Mexico (49.4%).

The most traveled to cities in the U.S. by California area Hispanics are San Diego (10.3%) and Los Angeles (8.8%).

One-fifth of the Hispanics in the Southeast who traveled by plane flew to the Dominican Republic (20.5%); one-tenth had also flown to Puerto Rico (9.6%).

Although Southeast area Hispanics tend to travel slightly more to Hispanic countries (58.2%), a total of 43.0% also travel to cities within the United States. Almost one-fifth (18.6%) made New York City their destination, and 9.7% traveled to Los Angeles.

The Hispanics who register the lowest level of plane travel to Spanish-speaking countries are those in the Southwest region (30.7%). Of the Hispanics in this region who did fly in the past year, 20.3% traveled to Mexico and 4.2% flew to Venezuela.

Thus, U.S. travel was more popular than travel to other countries among Hispanics in the Southwest. Los Angeles was the dominant place of travel among the Southwest Hispanics (30.3%); 17.7% indicated having flown to the City of Dallas/Ft. Worth.

2. By Country Of Origin

When comparing the destination of plane travel among Hispanics by their country of origin, the depth of the ties with their countries and families is even more apparent.

Of the 55.5% of Mexican-Americans who traveled abroad, 50.6% flew to Mexico. Similarly, of the 49.4% of Mexican-Americans who traveled within the United States 17.1% made Los Angeles their destination. This is consistent with the large Mexican population residing in the Los Angeles area.

1987
U.S. HISPANIC MARKET
DESTINATION OF FLIGHTS TAKEN IN THE LAST TWELVE MONTHS
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Other
U.S.A (Net)	**64.0%**	**49.4%**	**26.3%**	**31.5%**
Los Angeles	11.4	17.1	1.5	12.0
San Diego	23.2	2.4	0.0	4.9
Dallas/Ft. Worth	0.0	8.6	0.0	2.7
New York	14.6	3.2	0.6	3.4
Miami	3.2	2.7	10.5	0.0
San Francisco	0.6	2.8	0.0	5.7
San Antonio	0.0	3.0	0.0	1.9
Houston	1.2	3.4	0.0	0.0
Chicago	0.9	1.3	2.2	2.2
Phoenix	3.3	2.8	0.0	0.0
Other U.S.A	13.7	7.1	12.3	1.6
Other Countries (Net)	**36.9%**	**55.5%**	**78.4%**	**78.5%**
Mexico	4.7	50.6	2.9	3.9
Puerto Rico	3.7	0.0	69.4	3.3
Dominican Republic	13.6	0.0	5.1	29.5
Ecuador	0.0	0.0	0.0	11.8
El Salvador	0.0	0.2	0.0	10.1
Spain	3.9	1.4	0.0	1.2
Colombia	0.0	0.0	0.0	5.7
Canada	0.0	0.0	4.8	1.3
Venezuela	0.0	1.2	0.0	2.0
Costa Rica	3.6	0.0	0.0	2.4
Other	2.1	3.5	0.0	11.8

Sixty-nine percent of the Puerto Rican-Americans who traveled by air in the past twelve months flew to Puerto Rico. A total of 10.5% also flew to Miami.

Hispanic-Americans from other Latin countries flew to Spanish-speaking countries more often than any other group of Hispanic-Americans (78.5%). Most flew to the Dominican Republic (29.5%). Additionally, 11.8% flew to Ecuador and 10.1% embarked to El Salvador. This follows as the group of Other Hispanics is comprised mainly of Hispanics from Central and South America.

The U.S. city most frequently visited by Other Hispanics is Los Angeles (12.0%).

Plane travel destinations are somewhat different among Cuban-Americans than they are among other Hispanic-Americans. This is due primarily to the fact that most Cubans cannot visit their homeland.

Thirty-seven percent of Cuban-Americans flew to Spanish-speaking countries in the past year. The Dominican Republic was visited by 13.6% of the Cuban-Americans; Mexico was visited by 4.7%.

The majority of Cuban-Americans who traveled by plane in the past twelve months visited a U.S. city (64.0%). San Diego was the most frequently visited city by Cuban-Americans (23.2%); 14.6% had also flown to New York and 11.4% to Los Angeles.

XVIII. CONCLUSIONS

XVIII. CONCLUSIONS

- The 1980 Census placed the U.S. Hispanic population at 14.6 million persons. In the past seven years, it has grown 29% to 18.9 million persons.
- Mexican-Americans currently comprise the greatest percentage of Hispanics (58%) in the United States. Puerto Ricans (14%), and Cubans (6%) make up the second and third largest U.S. Hispanic groups.
- The States of California and Texas account for 54% of the total U.S. Hispanic population.
- The median age of Hispanics is 23.6 years.
- The average Hispanic household size is 3.5 persons.
- A total of 86% of the U.S. Hispanic Market is concentrated in the Top 33 Hispanic Markets.
- Over 50% of the Market is concentrated in the Top Six Hispanic Markets. They are:

Rank	Market (ADI)	Hispanic Population (000)
1	Los Angeles	3,614.0
2	New York	2,495.6
3	Miami	936.2
4	San Antonio	889.3
5	San Francisco	786.9
6	Chicago	753.7

- Among U.S. Hispanics, Spanish is the language which is spoken better, written better and read better.
- Compared to English, the Spanish language proficiency is almost three times greater than the English language proficiency.
- Over 90% of U.S. Hispanics learned Spanish as their "first language spoken."
- More than two-thirds of U.S. Latins prefer to speak Spanish in the home.
- Hispanics are brand conscious and loyal. One-half (49%) will not buy brands they have never heard of, even if they cost less. Fifty-five percent also believe that nationally advertised and popular name brands are superior in quality to store brands; 57% also believe that nationally advertised and popular brands are the best products for their family. Almost half of all Hispanics will be using the same brands they are using today one year from now.

- When shopping, Hispanics feel that it is very important that stores sell products that are geared to Hispanic tastes.

- The American Chain Supermarket is the most popular type of food store patronized by U.S. Hispanics (63%). Thirty-one percent also shop most frequently at Hispanic Chain Supermarkets.

- The average weekly grocery expenditure for a U.S. Hispanic family is approximately $102.41.

- Eighty-five percent of U.S. Hispanics patronize Hamburger Fast-Food Restaurants with an average of 2.8 visits a month. This compares to an 82% level of incidence for Chicken Fast-Food Restaurant patronage and a frequency of approximately 2.2 visits per month. Pizza type Fast-Food Restaurants are patronized slightly less often (77%) however, frequency still registers at approximately 1.9 visits per month.

- Seventy-three percent of all U.S. Hispanics own at least one automobile; the average number per household is 1.6.

- Twenty-nine percent of all U.S. Hispanics are credit card holders. The most popular types are department store cards (65%) and Bankcards such as MasterCard/Visa (61%).

- Approximately 31% of Hispanics have listed telephones, and 31% have no phone at all. Thirty-eight percent have a phone which is not listed.

- Home ownership is important. More than three-fourths of all Hispanics feel that it is very important to own their own home.

- Thirty-two percent of all U.S. Hispanics maintain a checking account, while 38% have a savings account.

- Almost two-thirds of Hispanics living in the United States who flew in the past twelve months traveled to Spanish-speaking countries; 42% flew to various U.S. cities.

- The U.S. Hispanic community is very proud of its background and believes in presentation of their culture and heritage.

- Almost three-fourths of U.S. Hispanics describe themselves as "Hispanic First/American Second."

- More than nine out of ten U.S. Hispanics agree with, "I Am Proud To Be Hispanic And I Think Our Culture, Language And Traditions Should Be Preserved."

- Median family income among Hispanics is now $22,900 per household.

- Total aggregate household income for the U.S. Hispanic Market approximates $158 billion.

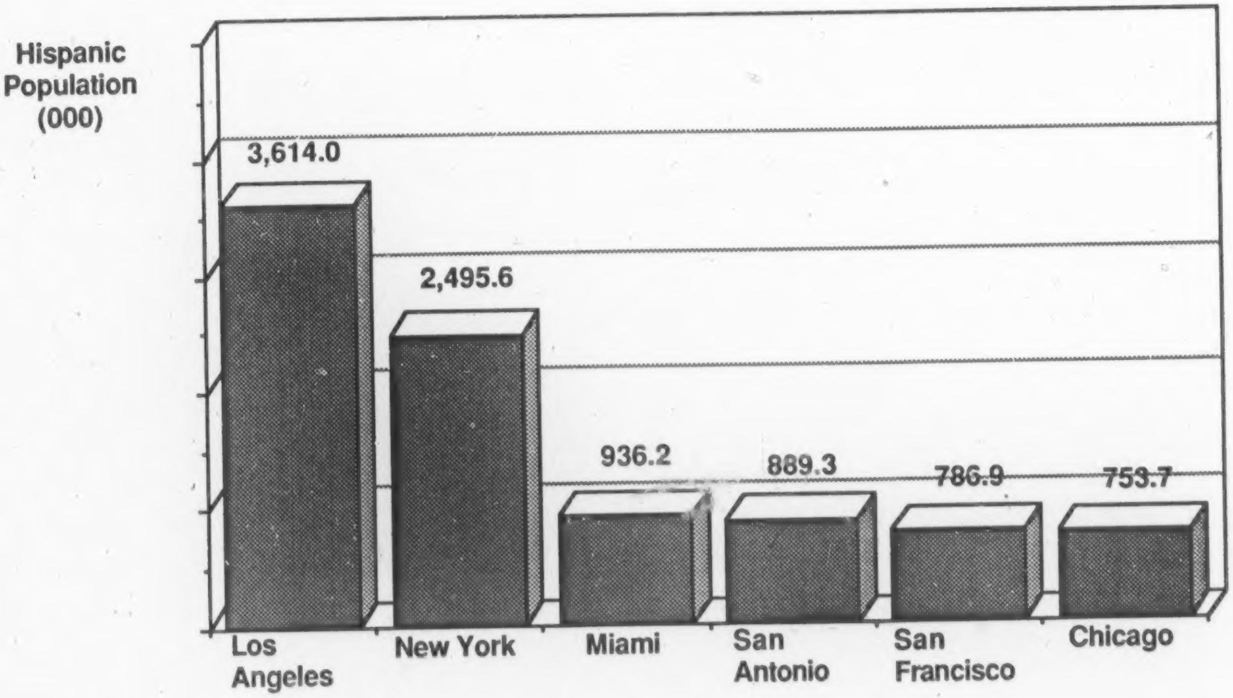
* Personal consumption expenditures in 1985 should reach $134 billion.
* In the past 30 years, almost one-third of all immigrants to the U.S. came from Spanish-speaking countries.

* They represent the largest group of current immigrants to the U.S.

* The underlying reasons for immigration to the U.S. are economic, political and social in nature, and the conditions which have fostered the past 30 years' emigration are still in effect. Thus, the rate of potential future Latin arrivals, both legal and illegal, is estimated to continue to dominate U.S. immigration in the 1980's and 1990's.

* Therefore, the U.S. Hispanic Market will continue to grow, swelling its numbers to well over 20 million persons.

U. S. Hispanic Population
Top 6 ADI'S
1987

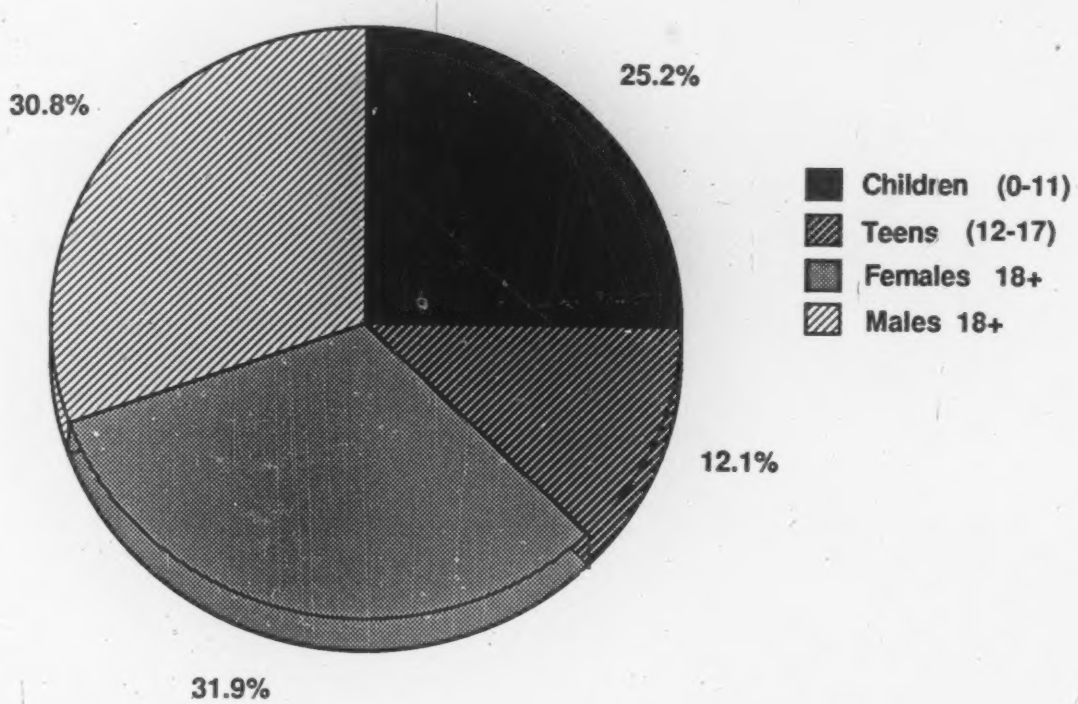


Source: *Strategy Research Corporation*

1987
U.S. Hispanic Market

Age/Sex Distribution
Percent Distribution

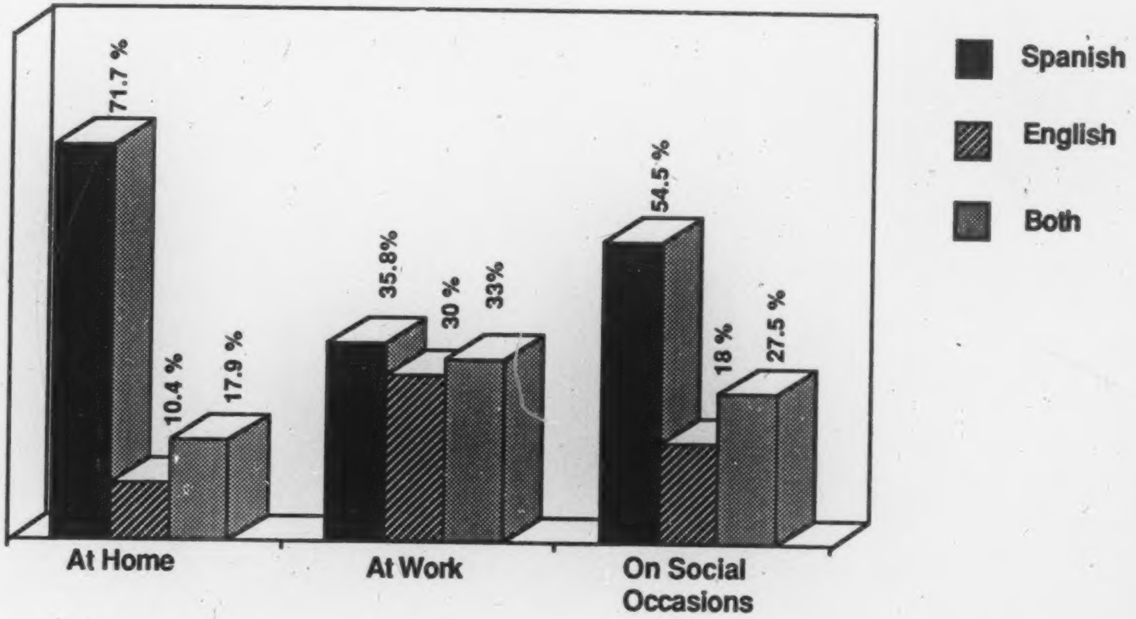
Median Age = 23.6 Years



Source: Strategy Research Corporation

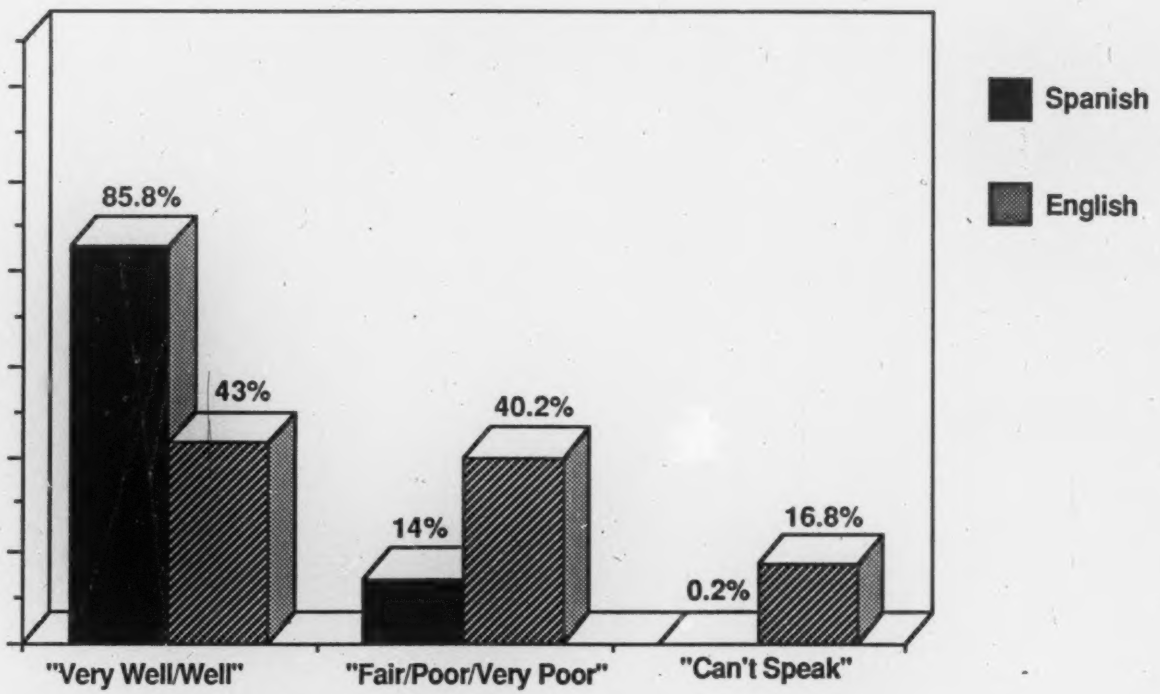
1987
U.S. Hispanic Market

Language Spoken By U.S. Hispanic At Various Times



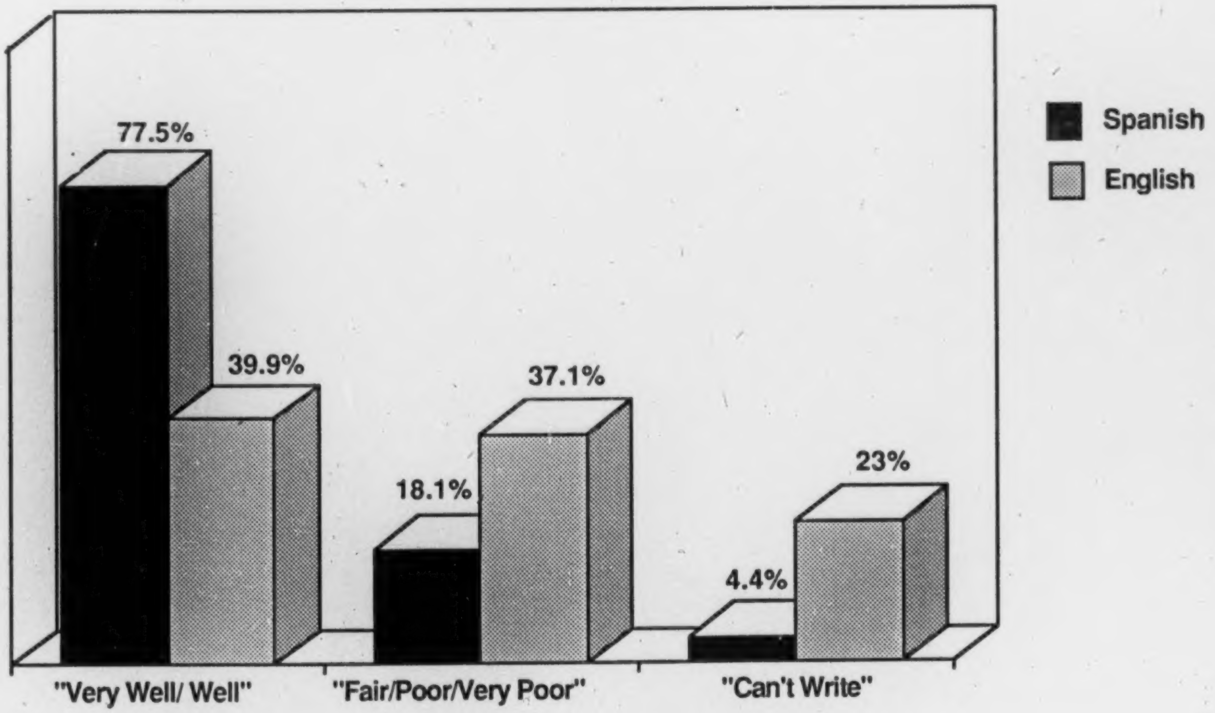
Source: *Strategy Research Corporation*

1987
U.S. Hispanic Market
Fluency of Speaking Spanish/English



Source: Strategy Research Corporation

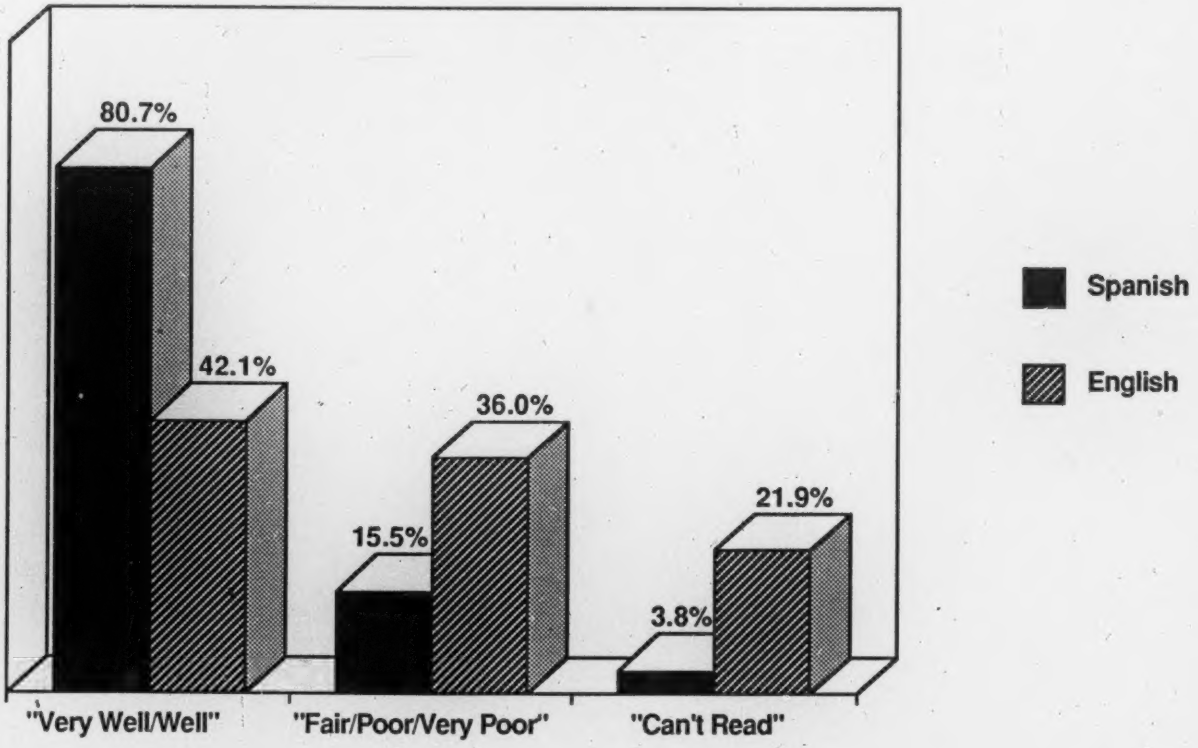
1987
U.S. Hispanic Market
Proficiency of Writing Spanish/English



Source: *Strategy Research Corporation*

1987
U.S. Hispanic Market

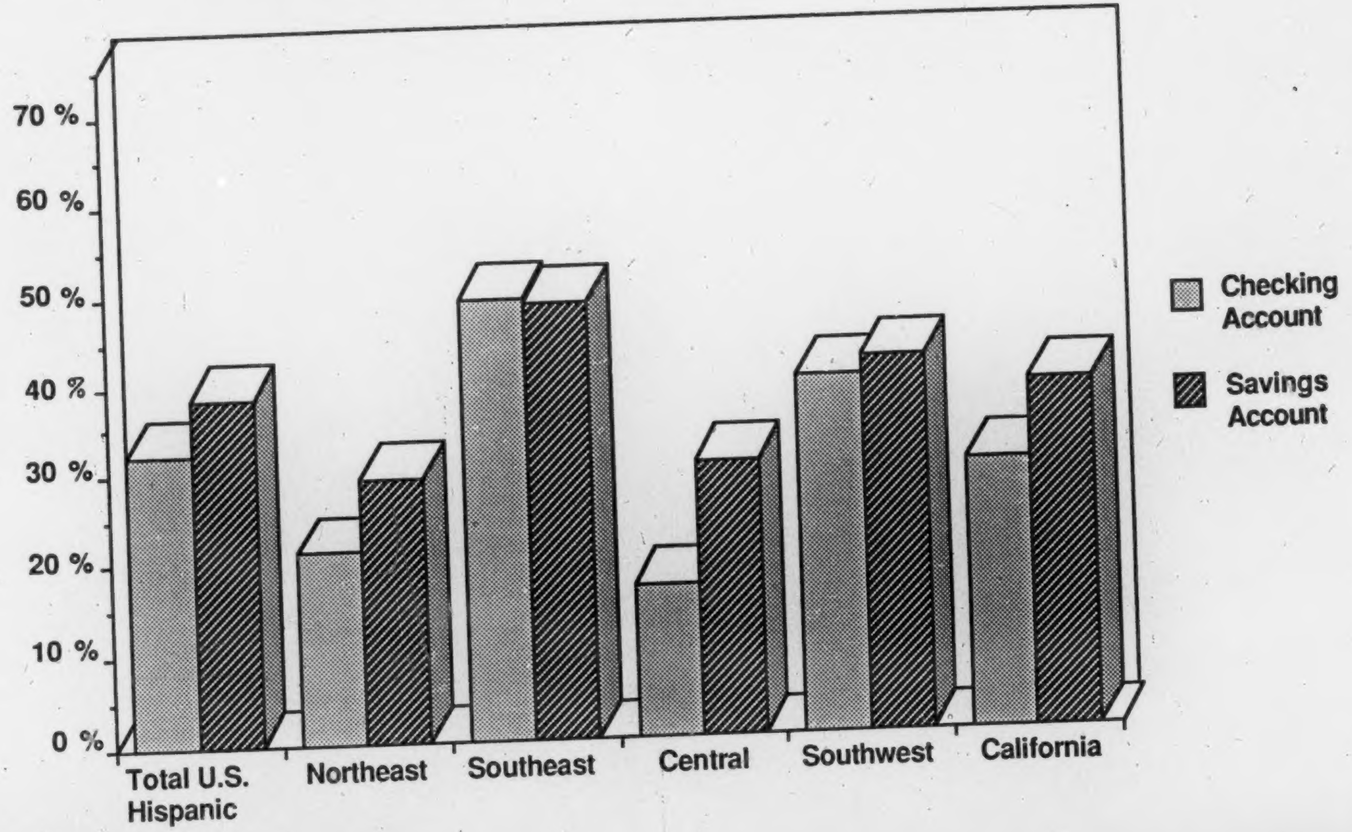
Ability of Reading Spanish/English



Source: Strategy Research Corporation

1987
U.S. Hispanic Market

Checking/Savings Account By Market Region



Source: Strategy Research Corporation.

GOLD SPONSORS

Adolph Coors Company

BlairSpan

The Bravo Group Young & Rubicam N.Y.

Caballero Spanish Media, Inc.

Cadena Radio Centro

Campbell-Ewald Latina Advertising

Coca-Cola Corporation

Conill Advertising, Inc.

Eastern Airlines

J.C. Penney Co., Inc.

National Association of Hispanic Publications

NetSpan

The Prudential

Radio Suave - 1260 AM, Miami

SIN Television Network

Spanish International Communications Corporation

Vista Magazine

WQBA - 1140 AM/Super Q 108 FM, Miami

Zubi Advertising Services, Inc.

SILVER SPONSORS

American Greetings Corporation

AT&T

Beatrice/Hunt-Wesson

Casanova Pendrill Publicidad, Inc.

Castor Spanish International, Inc.

Consolidated Bank

Creative Group

Diario Las Americas

Donnelley Marketing

El Diario/La Prensa

General Foods

IAC Advertising Group, Inc.

Merced Benitez Machin & Asoc., Inc.

Miami Mensual

Montemayor & Asociados, Inc.

Tichenor Spanish Radio

WSNS TV - Channel 44, Chicago

BRONZE SPONSORS

American Express Company

Bristol - Myers Company

Citibank, N.A.

Iberia Airlines of Spain

Lotus Hispanic Reps

Mazola Oil

Metropolitan Life and Affiliated Companies

Sears, Roebuck and Co.

Selecciones del Reader's Digest

The Seven-Up Company

The Southland Corporation

Southwestern Bell Telephone

Thanks to Strategy Research Corporation employees who have helped complete this **1987 U.S. Hispanic Market Study.**

Alex Alvarez
Steve Alvarez
Ivette Amaro
Gary Berman
Alex Cifuentes
John Cutts
Mario de la Guardia
Melba Diaz de Martinez
Ivy Dixon
Nancy Fournier
Margarita Garcia-Feito
Maria Auxiliadora Gomez
Rosy Gonzalez
Peter Goodridge
Elizabeth Grudzinski
Gail Hall
Vivian Hernandez
Daniel Holmes
Morvin Isidora
Steve Johnson
Marily Jove
Paul Lambert
Raul Lopez
James Loretta
Edgar Mendez
Lourdes Miro
Armaldo Morales
Cecilia O. Polendo
James Richard
Carlos Rodriguez
Odalys Rodriguez
Gisela Rubido
Martha Selaya
Norma Jean Shiran
Laura Sierra
Frank J. Szalay, Jr.
Karen Tobin
Richard H. Tobin
Michael Tonino
Janitza Torres
John Van Cak
Emilio Vazquez
Yolanda Zevallos

And, special thanks to Tony Sierra and S & S Litho for their help in producing this Study.

This study shall not be reproduced, in total or in part, by any means mechanical or otherwise, nor shall any use be made of this study without the express authorization of STRATEGY RESEARCH CORPORATION. Any unauthorized reproduction or use shall be prosecuted to the full extent of the law.

HEADQUARTERS:
100 N.W. 37th Avenue,
Miami, FL 33125
(305) 649-5400

El Monte Mall, Third Floor, Suite 2,
Hato Rey, P.R. 00918
(809) 764-3586

60 E. 42nd Street,
New York, NY 10165
(212) 661-3050